

26th Europe Conference

4-6 March 2024, Istanbul

[#FastmarketsForestProducts](#) [#FMEurope](#) [#PPIAwards](#)

External Speakers:

1. Joachim Klein, **Managing Director, Stepchange Consulting**
2. Nick Mockett, **Partner, Moorgate Capital**
3. Horst Bittermann, **Director General, Procarton**
4. Eleni Despotou, **Director General, FEFCO**
5. Jori Ringman, **Director General, CEPI**
6. Markus Gaertner, **CEO, Mondi Corrugated Packaging**
7. Ilkka Leppävuori, **Global Forest Products, Paper & Packaging Lead, Bain & Company**
8. Michele Bianchi, **CEO, RDM**
9. Stefano Rossi, **CEO Packaging, DS Smith**
10. Andrea Boltho, **Emeritus Fellow, Magdalen College, University of Oxford and Oxford Economics**
11. Jonathan Edmunds, **Head of Recyclability, Sustainability, & Gov Affairs (Recycling) DS Smith**
12. Sevinç Yener, **CEO, Mondi Corrugated (Turkey)**
13. Frank Heidlberger, **Director of Global Packaging & Supply Chain, McDonald's**
14. Mike Turner, **Managing Director, ECMA**
15. Harald Ganster, **CEO, Prinzhorn Group**
16. Nick Mockett, **Partner, Moorgate Capital**
17. Harald Ganster, **Managing Director, Prinzhorn Group**
18. Ismet Müstecaplıoğlu, **Managing Director, REIS Pazarlama ve Ticaret**
19. Orhan Öğücü, **Chairman of the Board, Lila Kagit**
20. Sevinç Yener Çimecioglu, **CEO, Mondi Corrugated Turkey**
21. Joao Bayma, **Procurement Director, Global Paper & Flexible Packaging, Reckitt**
22. Dirk Längin, **Head of Fibre Sourcing, Mondi Group**
23. Alexander Buck, **Executive Director, IUFRO (International Union of Forest Research Organizations)**
24. Marc Ostwald, **Chief Economist & Global Strategist, ADM Investor Services**
25. Yiannis Parganas, **Head of Research, Intermodal Shipbrokers**

Internal Speakers:

26. Matt Graves, **Senior Vice President, Fastmarkets**
27. Lasse Sinikallas, **Director - Macroeconomics, Fastmarkets**
28. Alejandro Mata, **Director Europe Packaging and Graphic Papers, Fastmarkets**
29. Patrick Cavanagh, **Senior Economist – Global Pulp, Fastmarkets**
30. Hannah Zhao, **Director, Fiber Markets, Fastmarkets**
31. Philipp Jaki, **European Analyst, European Forest Products, Fastmarkets**
32. Tero Eerikainen – **Economist, Fastmarkets**
33. Camila Jaramillo, **Associate Economist, Fastmarkets**
34. Esko Uutela, **Principal, Tissue, Fastmarkets**
35. Ville Henttonen, **Director, EMEA Mill Intelligence Fastmarkets**

Day 1 Monday 4 March

14:00 Registration opens

15:40 **Global Packaging Trends:**

- An overview of mega trends in packaging
- A review of the current market dynamics
- Key demand drivers: demographics, usage rates, and growth in per capita income

Alejandro Mata, Director, Europe Packaging and Graphic Papers, Fastmarkets

16:10 **Europe's Wood and Fiber Supply in Disruptive Times**

- Key challenges faced by the wood-based sector
- Europe's fiber security future – demand outpacing supply
- Proactive measures to secure fiber supply – preview of insights from a new scientific study, conducted within the science-business collaboration “TeamingUp4Forests”

Dirk Längin, Head of Fibre Sourcing, Mondi Group

Alexander Buck, Executive Director, IUFRO (International Union of Forest Research Organizations)

16:30 **Machine Conversion – Risks And Opportunities**

Increasing numbers of mill owners are choosing to convert paper machines to packaging and other grades as the decline in graphic paper continues. But machine conversion is far from simple, carries significant cost – and risks. This session will consider the risk and opportunities of machine conversion, and look at successful cases.

17:00 **Meet the Team: An exclusive opportunity for New Delegates**

New to the Europe Conference or here on your own? Why not join us for an exclusive opportunity to meet the Fastmarkets team, and other new delegates ahead of the main cocktail reception. Flag your areas of interest and our team will help introduce you to people who could be right up your street. **Only open to first time delegates*

17.30-18:30 **Networking Drinks**

DAY 2 – Tuesday 5 March

08.00 **Registration open**

08.55 **Welcome remarks**

Matt Graves, Senior VP, Fastmarkets Forest Products

9.00 Keynote: The Shifting Geo-Economic Landscape

Two years on from Russia's invasion of Ukraine, there is still no resolution in sight. With a new conflict in the Middle East, looming US elections, and an uncertain outlook for US/China relations, our expert speaker will consider the current state of the geopolitical landscape, what it means for GDP around the world, and the impact on Europe.

Andrea Boltho, Emeritus Fellow, Magdalen College, University of Oxford and Oxford Economics

09:40 European CEO of the Year Award & Address

This award will be presented to an outstanding individual who has set himself or herself apart in the world of pulp and paper. The winner will be the CEO that has delivered a strong performance and various elements will be taken into account, including overall strategy, financial performance and leadership qualities.

09:50 CEO Panel

- Geopolitical headwinds – how will they impact the paper and packaging sector?
- Sustainability and innovation developments
- Industry mega-trends
- Changing trade flows

Moderator: Joachim Klein, Managing Director, Stepchange

Markus Gaertner, CEO, Mondi Corrugated Packaging

Michele Bianchi CEO, RDM

Stefano Rossi, CEO Packaging, DS Smith

Harald Ganster, Managing Director, Prinzhorn Group

10:45 Networking break

11.15 Global Macroeconomic Outlook

- World economic drivers for forest products industry
- Inflation and recession status update
- How is Europe's economy affected by these factors?
- Exploring sector performance and profitability
- Financing in the content of ESG

Lasse Sinikallas, Director - Macroeconomics, Fastmarkets

11:45 Fastmarkets outlook: Global tissue

- Global demand growth driven by emerging markets
- European market in a lull
- Turkish investments continue and partly target export markets

Philipp Jaki, European Analyst, European Forest Products, Fastmarkets

12.15 Panel: Tissue – Prospects for Growth

- Success factors for Turkish tissue export growth
- Will investment in Turkey's tissue industry continue?
- Specific sustainability challenges around tissue production?
- How has the away from home sector recovered post-pandemic?

Moderator: Ismet Müstecaplıoğlu, Managing Director, REIS Pazarlama ve Ticaret

Esko Uutela, Principal, Tissue, Fastmarkets

Orhan Ögücü, Chairman of the Board, Lila Kagit

13:00 **Networking lunch**

14:15 **Fireside Chat: Regulatory Update**

The EU's Packaging and Packaging Waste regulation amendment has provoked a backlash from the paper packaging industry, amid fears of a sharp increase (up to 1,500%), in the use of rigid plastic packaging. Meanwhile the Deforestation Regulation poses enormous challenges both for companies working within the EU, but also those who trade/import to EU countries. This session will give an update on both issues.

Moderator: Eleni Despotou, Director General, FEFCO

Horst Bitterman, Director General, PRO CARTON (European Association of Carton and Cartonboard Manufacturers)

Jori Ringman, Director General, CEPI

15:00 **Fireside Chat: Is Europe's Recycling System Fit for Purpose?**

- The role of legislation – and depoliticising infrastructure decisions (currently no mandated collection ratio)
- What's behind the slump in recycling rates?
- How to address Europe's recycled fiber degradation? How do we maintain high-quality recycled fiber within Europe?
- What does 'good' look like, and what's the industry cost?

Moderator: Hannah Zhao, Director, Fiber Markets, Fastmarkets

Jonathan Edmunds, Head of Recyclability, Sustainability, & Gov Affairs (Recycling) DS Smith

Mike Turner, Managing Director, ECMA (European Carton Makers Association)

15:30 **Networking break**

16:00 **Fastmarkets Outlook: European Containerboard**

- Weak demand conditions slowing the containerboard demand recovery
- Increasing capacity will exacerbate the oversupply situation
- Falling operating rates could threaten producers' profitability and push capacity out of the market

Tero Eerikainen, Economist, Fastmarkets

16:30 **Panel: Trends in industry capacity development**

- What are the drivers for the capacity changes? Will anything change in coming year?
- Is consolidation and mill closures the only solution to mitigate the impact of capacity issues?
- Trends between organic growth vs M&A activity

Moderator: Ilkka Leppävuori, Global Forest Products, Paper & Packaging Lead, Bain & Company

Nick Mockett, Partner, Moorgate Capital

17:15-18:15 **Networking Drinks**

18.45 – 22:15 **PPI Awards**

DAY 3 – Wednesday 6 March

08.00 Registration Opens

8:00-8:45 Women in Forest Products Breakfast

08.55 Welcome remarks

Matt Graves, Fastmarkets

09:00 Keynote: Energy Outlook for Europe

- Mid-term outlook for energy prices and drivers
- Near term risks for Europe's energy security
- How the Israel/Gaza war has impacted natural gas supply and pricing

Marc Ostwald, Chief Economist & Global Strategist, ADM Investor Services

09:30 Fastmarkets Outlook: Global Pulp

- The investment cycle for new market pulp capacity is winding down, when will markets begin to tighten up?
- Can we expect a return to "normal" seasonal demand patterns in 2024?
- Synchronized demand growth: Will pulp buyers in Europe, North America and China come into alignment or remain decoupled?

Patrick Cavanagh, Senior Economist – Global Pulp, Fastmarkets

10:00 Fastmarkets Outlook: Paper for Recycling

- Review of global paper for recycling demand and supply dynamics
- The effects of regulations on European paper for recycling markets
- Future paper for recycling availability

Hannah Zhao, Director, Fiber, Fastmarkets

10:30 Networking break

11:00 Panel: End User Perspectives

- Consumer trends and insights – how higher costs are impacting behaviours
- Plastic substitution trends
- Supply challenges and change in trade flows

Moderator: Matt Graves, Senior VP, Fastmarkets

Frank Heidlberger, Director of Global Packaging & Supply Chain, McDonald's

Nicolas Gusse, Global Category Manager, Paper, Heineken

Joao Bayma, Procurement Director, Global Paper & Flexible Packaging, Reckitt

11:45 Spotlight on Turkey

An overview of Turkey's pulp, paper & packaging sector, including growth opportunities, export markets and regional drivers.

Sevinç Yener Çimecioğlu, CEO, Mondi Corrugated Turkey

12:15 Fastmarkets Outlook: Other Paper Packaging Market Trends

- A deep look into the actual situation and main demand drivers of the European boxboard and sack kraft markets' demand
- Outlook for the European boxboard and sack kraft markets over the next two years

- Threats, challenges, and opportunities for the boxboard and sack kraft markets, including new regulations, plastic substitution, and high wood prices.

Camila Jaramillio, Associate Economist, Pulp, Paper & Tissue, Fastmarkets

12:45 **Networking Lunch**

14:00 **Fastmarkets Outlook: European Graphic Paper**

- Do consumers really need graphic papers?
- Industry still in oversupply even when considering latest announcements.
- Rising cost inflation and low operating rates continue threatening producers' margins. Is this the new normal?
- Two year outlook of the European graphic paper industry

Alejandro Mata, Director Europe Packaging and Graphic Papers, Fastmarkets

14:30 **Panel: Shipping Disruption: What Next?**

- The impact of the Red Sea conflict on global trade dynamics
- The effect of extended voyage times on supply and demand
- How is risk being mitigated?
- What lies ahead for freight passing through the region?

Yiannis Parganas, Head of Research, Intermodal Shipbrokers

15:15 End of Conference

.....