

Pre-Day: Monday 9th March**(Timing TBD) Site Visit**

(Details and timing to be confirmed; participation in the site tour is subject to review)

Join us for an exclusive site visit to one of Spain's leading mills near Barcelona! This free-to-attend mill tour offers a behind-the-scenes look at state-of-the-art operations driving efficiency, capacity, and sustainability across the value chain. Transportation and refreshments are included — spaces are limited, so be sure to reserve early. Confirm your attendance during registration.

17.00 – 18.30 **Registration Opens**

17.00 – 18.30 **Champagne Roundtables**

17.00 – 18.30 **Welcome Reception**

Tuesday 10th March**SESSION ONE | Boardroom Outlooks**

08.00 – 09.00 **Registration, Networking, Refreshments**

09.00 – 09.05 **Opening Remarks**

09.05 – 09.30 **Macroeconomic Overview**

- Economic growth drivers for Europe
- European inflation scenery
- Global economic uncertainty

Lasse Sinikallas, Director of Macroeconomics, Fastmarkets

09.30 – 09.55 **Macro Industry Overview – The Global Market Pulse**

- Reviewing the latest European and global supply and market outlook
- Examining the long-term impact of consolidation and closure trends
 - Lessons learnt and market impact from major M&A activity
- Exploring oversupply risk management strategies
- Assessment of Brazil and LATAM production capacity and its influence on global supply and pricing
- Exploring future trade flows and demand trends

09.55 – 10.05 **European CEO of the Year Award**

Presenting of the annual award and a speech from the 2026 European CEO of the year.

Presented by Joachim Klein, Managing Director, StepChange

10.05 – 10.55 CEO Panel: The Future of M&A, Consolidation and Growth in a Challenging Market

- Analysing the next wave of consolidation: Which segments and regions are most likely to see further M&A as balance sheets tighten and valuations reset
- Strategic resilience under pressure: How leaders are navigating mill closures, structural oversupply, and persistent cost inflation
- From innovation to commercialisation: Turning R&D into scalable, market-ready products that deliver measurable returns
- Collaboration as a growth lever: Lessons from successful joint ventures and cross-sector partnerships driving competitiveness and sustainability
- Operational excellence: Streamlining assets, logistics, and procurement to protect margins in a low-demand environment
- Balancing volume and value: Managing capacity, pricing, and product mix amid fierce competition, underutilisation, and a delayed recovery outlook to 2027

Moderator: Joachim Klein, Managing Director, Stepchange

Esa Kaikkonen, CEO, Metsä Board

10.55 – 11.25 Networking Break**11.25 – 11.55 Containerboard and Boxboard Outlook**

Alejandro Mata Lopez, Director, European Packaging and Graphic Paper, Fastmarkets

11.55 – 12.30 Panel | Decoding Demand: What End-Users and Brand Owners Expect from Tomorrow's Packaging

As brand owners respond to fluctuating consumer demand and evolving expectations around sustainability, packaging performance, and price, this session will discuss the critical success criteria when sourcing for the future.

- Translating multi-tiered end-user expectations into actionable supplier and scalable production strategies
- Exploring effective strategies for aligning material development and product roadmaps with end-user expectations
- Assessing how to turn overcapacity challenges into opportunities for innovation
- Future-proofing: evaluating tactics to remain agile, robust, and resilient in changing environments

12.30 – 13.25 Networking Lunch**SESSION TWO | Future-Proof Frameworks: Navigating Regulation, Sustainability and Cost Efficiencies****13.25 – 13.45 Presentation | The Policy Paradox: Balancing Circular Ambitions with Production Realities**

This session discusses the balance between legislative ambition and industrial reality — where policy meets production.

- Demystifying national interpretations of EU policy to maximize production efficiencies and improve cost-effectiveness

- Analysing how industry stakeholders are navigating uncertainty stemming from PPWR and EUDR delays and evolving secondary legislation
- Evaluating CBAM's impact on energy-intensive operations and the resulting shifts in procurement and energy strategies
- Exploring how CSRD implementation can support the development of shared ESG metrics and enhance transparency throughout the value chain

Jori Ringman, Director General, CEPI (Confederation of European Paper Industries)

13.45 – 14.15 Recovered Paper Outlook

Hannah Zhao, Director, Fiber, Fastmarkets

14.15 – 14.45 Panel | Beyond Compliance: Turning Regulation into Competitive Advantage

This discussion brings together producers and converters to share how they are moving from compliance to competitiveness and finding efficiencies in an increasingly complex policy environment.

- Delving into an in-depth analysis of SMEs from Germany, Poland, and Italy that are reframing compliance as a lever for brand trust, efficiency, and market leadership
- Examining how companies are using PPWR's extended timeline to optimise packaging portfolios and align innovation cycles with future requirements
- Identifying practical, scalable solutions that address data integration challenges for EUDR traceability requirements

14.45 – 15.00 Presentation | Sourcing for biomass: are there still potentials for cascading uses?

- Identifying the key opportunities for diversification through biomass utilization across pulp, packaging, and bio-based materials sectors
- Assessing market readiness and investment trends in bio-based products and renewable feedstocks
- Evaluating the role of technology and partnerships in accelerating the circular bioeconomy transition

15.00 – 15.30 Presentation | Mill Decarbonisation

Ville Henttonen, Director, EMEA Mill Intelligence, Fastmarkets

15.30 – 16.00 Networking Break

15.30 – 16.00 Tietoevry Workshop

Jyri Jokinurmi, Global Business Development Director, Tietoevry

David Wojciechowski, Product Manager – Paper & Board, Tietoevry

16.00 – 16.30 Kraft Paper Outlook

Camila Jaramillo, Economist, Fastmarkets

16.30 – 17.05 Rapid-fire Presentations: Upstream | Cost-efficiency, Digitalization, Automation: Innovative Optimization Strategies

This rapid-fire session explores how upstream industry players – mill operators, suppliers, converters, and decision-makers – can leverage the latest technologies to boost operational

efficiency and sustainability. Plus, analysing the tipping point between future cost optimization and capital investment. Followed by a rapid-fire Q&A session.

17.05 – 17.30 Think Piece | Cross-commodity: What other industries are surviving with an oversupplied market?

While the pulp, paper, and packaging industries grapple with prolonged oversupply, they're not alone — other sectors, from lithium to automotive, have faced similar cycles and emerged more efficient, more digital, and more agile. This think piece examines how cross-commodity peers have adapted to structural imbalance, focusing on the tools, technologies, and transformation strategies that helped them stay competitive.

17.30 – 19.00 Networking Reception

Wednesday 11th March

SESSION THREE | Global View

08.30 – 9.00 Registration, Networking, Refreshments

09.00 – 09.30 Presentation | Global Pulp Market Outlook

Patrick Cavanagh, Senior Economist, Fastmarkets

09.30 – 09.40 Industry Woman of the Year Award & International CEO of the Year Award

Presenting of the annual award and a speech from both award recipients.

Presented by Joachim Klein, Managing Director, StepChange

09.40– 10.10 Presentation | Global Pressure Points: Asian Paper and Board Capacity Expansion and Its Potential Impacts on Europe

- Examining the reasons for the growing imbalance in Asia for packaging and P&W grades
- Discussing the competitiveness of Asian products
- Exploring shifts in trade patterns and outlook for future

Beth Lis, VP Asian Paper & Packaging, Fastmarkets

10.10 – 10.35 Presentation | Cross-border Implications: Potential Safeguarding Scenarios on Asian Imports

As Europe tightens its sustainability rules, new cross-border complexities are emerging for global pulp, paper and packaging supply chains. This session explores the current state of the market for Asian exporters and European buyers— and possible regulatory avenues that can help prevent disruption, ensure transparency, and maintain competitiveness across borders.

- Analysing the evolving impact of tightening rules on sourcing strategies and supplier relationships in Asia
- Assessing the alignment between EU sustainability standards and available technologies in key exporting markets
- Looking for opportunity elsewhere: exploring the viability of Latin America as a potential market for the excess Asian capacity

10.35 – 11.05 North America Outlook

- Impact of trade tensions on US economy and paper markets
- Capacity rationalization and North American markets' path to market balance
- Cost inflation and US exceptionalism

Derek Mahlborg, Director, North American Graphic Paper and Packaging, Fastmarkets

11.05– 11.35 Presentation | Global Pressure Points: Shifting Trade Dynamics Across the Americas

- Examining how evolving trade policies, tariffs, and currency movements are influencing transatlantic competitiveness and export flows
- Assessing how Brazil's expanding low-cost pulp capacity is impacting global cost benchmarks
- Exploring how Europe fits within a changing global pulp and board landscape amid mounting political and cost pressures— and what they signal for future market balance

Rafael Barisauskas, Senior Economist, Fastmarkets

11.35 – 12.05 Networking Break**12.05 – 12.35 Panel | Counting Carbon, Crossing Borders: What CBAM Means for Supply Chains in Europe and Beyond**

- Assessing CBAM's implications for pulp, paper, and board — where costs, coverage, and compliance stand
- Exploring international responses and alternatives to CBAM — from China and Brazil to South Korea and California
- Understanding Scope 3 emissions requirements and how they're shaping supplier expectations and reporting systems

SESSION FOUR | Shaping What's Next**12.35 – 13.05 Graphic Paper Outlook**

Alejandro Mata Lopez, Director, European Packaging and Graphic Paper, Fastmarkets

13.05 – 13.30 Presentation | Consumer Trends: Price vs. Planet: How Consumer Choices Are Reshaping the Future

- Analysing emerging consumer trends and their implications for the packaging industry
- Assessing the long-term viability of premium pricing for sustainable packaging — Are consumers willing to pay extra?
- Understanding demographic shifts and how evolving consumer preferences will shape the packaging industry

Winnie Muehling, Director, Marketing and Communications, ProCarton

13.30 – 14.30 Networking Lunch**14.40 – 15.10 Tissue Market Outlook**

Philipp Jaki, Economist, Fastmarkets

15.10 – 15.40 Presentation | Competitiveness Under Pressure: Regulation, Resilience, and the Future of Tissue in Europe

Draft agenda – subject to changes and not for public circulation.

As Europe's tissue sector faces increasing regulatory complexity, this session explores how new EU policies are reshaping competitiveness, trade dynamics, and sustainability commitments across the value chain. Drawing on insights from the first-ever socio-economic study conducted by the European Tissue Symposium (ETS), this presentation will highlight the vital contribution of the tissue industry to Europe's economy—while assessing how current and upcoming regulatory measures could influence its future resilience.

- Understanding the tissue sector's socio-economic footprint and its strategic role in Europe's industrial ecosystem
- Evaluating how emerging legislation impacts competitiveness, trade flows, and investment confidence
- Exploring pathways to balance sustainability ambition with the operational realities of a key everyday product industry

15.40 – 16.10 Pulpwood Outlook

Marcos Madruga, Fastmarkets

16.10 – 16.35 Case Study | Joint Innovation Programs

Innovation can't happen in silos. This case study explores how cross-functional R&D partnerships are aligning upstream capabilities with downstream performance and market needs.

- Reviewing co-development initiatives focused on alternative packaging solutions and next-generation materials
- Exploring the commercial balance between consumer sustainability preferences and price sensitivity
- Assessing how shifting retail and e-commerce dynamics are driving demand for smaller, right-sized packaging formats

16.35 – 17.10 Rapid-fire Presentations: Downstream | Start-Ups Bringing Practical and Scalable Solutions to the Packaging Market

This rapid-fire session spotlights the latest innovative start-ups in the packaging sector that have hit the ground running. It will cover barrier technology, molded fiber sustainable packaging solutions, and market-ready innovations. Followed by a rapid-fire Q&A session.

17.10 – 17.15 Closing Remarks