

**Pre-Day: Monday 9<sup>th</sup> March****Mill Tour | Visit RDM's Paprinsa Mill in Lleida**

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.

*Attendees will be provided with overshoes, safety vests, safety hats, and earplugs.*

**14.00 Registration Opens**

**17.00 – 18.30 Welcome Reception**

**Tuesday 10<sup>th</sup> 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 scenario
- Global economic uncertainty

*Lasse Sinikallas, Director of Macroeconomics, Fastmarkets*

**09.30 – 09.40 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*

**09.40 – 10.20 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
- Technology and AI

*Moderator: Joachim Klein, Managing Director, StepChange*

*Esa Kaikkonen, CEO, Metsä Board*

*Michele Bianchi, CEO, RDM Group*

*Susana Alejandro, President & CEO, Saica Group*

*Stefano Rossi, CEO, Packaging Europe, DS Smith*

#### 10.20 – 10.45 **Networking Break**

#### 10.45 – 11.15 **Containerboard and Boxboard Outlook**

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

#### 11.15 – 11.45 **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

*Moderator: TBD*

*Romil Agarwal, Procurement Manager, Reckitt*

#### 11.45 – 12.00 **Decarbonisation in European Pulp and Paper: Policy Drivers and Abatement Options**

- State of European pulp and paper emissions today
- Drive to decarbonisation in the next ten years, including increasing compliance costs under the EU ETS
- Decarbonisation levers including a deep dive into the economic potential and feasibility of BECCS

*Josh Cowley, Head of Research – Carbon, Fastmarkets*

#### 12.00 – 12.30 **Panel | From Policy to Projects: Carbon Investment Signals Across the Value Chain**

*A practical discussion grounded in real-world decision-making across the value chain.*

- Clarifying what is investable today across operations, technology, and product strategy, versus what remains contingent on clearer policy and market signals.
- Evaluating how downstream customers and brand owners are responding to carbon, regulation, and sustainability commitments—and how clearly those signals are translating upstream.
- Launching next-generation carbon capture pilots via co-development initiatives.

*Josh Cowley, Head of Research – Carbon, Fastmarkets*

*Horst Bittermann, Director General, ProCarton*

**12.30 – 13.30 Networking Lunch**

## **SESSION TWO | Future-Proof Frameworks: Navigating Regulation, Sustainability and Cost Efficiencies**

### **13.30 – 13.50 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

*Ana Diaz Cordero, Public Affairs Director, CEPI (Confederation of European Paper Industries)*

### **13.50 – 14.20 Recovered Paper Outlook**

*Hannah Zhao, Director, Fibre, Fastmarkets*

### **14.20 – 14.50 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

*Moderator: Eleni Despotou, Director General, FEFCO*

*Susana Braz, Head of Government Affairs, DS Smith*

*Paulo Leime, Managing Director EMEA, Suzano*

*Anna Olshanskaya, Category Lead Paper & Board, Product Line Director Industrial, Cargill*

### **14.50 – 15.10 Presentation | The Plastic Phase-Out: Packaging Transition, Fibre Innovation, Barrier Technology**

- How FMCGs, converters, and retailers are adjusting their portfolios as plastic reduction targets tighten
- The opportunities and challenges for cartonboard in replacing legacy formats across food, cosmetics, pharma, and e-commerce.

- An update on the state of sustainable barriers —bio-based barriers, recyclable solutions, and upcoming technologies — and what is realistically scalable across Europe's converting base.

*Mike Turner, Managing Director, ECMA*

#### 15.10 – 15.35 **Presentation | Mill Decarbonisation**

- Decarbonisation roadmap
- Economic drivers of decarbonisation
- Decarbonisation strategies of paper mills
- Energy and emissions as the key cost drivers
- Carbon footprint in evaluation of paper suppliers

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

#### 15.35 – 16.05 **Networking Break**

#### 15.35 – 16.05 **AI-Powered Pulp & Paper: Lean, Green & Competitive**

*Jyri Jokinen, Global Business Development Director, Tietoevry*

*David Wojciechowski, Product Manager – Paper & Board, Tietoevry*

#### 16.05 – 16.30 **Sack Kraft Paper Outlook**

- A deep look into the actual situation and main demand drivers of the current European sack kraft markets' demand. Share of traditional drivers vs new uses.
- Outlook for the European boxboard sack kraft market over the next two years.
- How tariffs have been affecting sack kraft global trade flows and expectations about the future of European sack kraft exports.
- Threats, challenges, and opportunities for the sack kraft markets, including competitiveness challenges, new regulations, and plastic substitution.

*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.

- Satellite Monitoring & Forest Compliance: partnership between satellite analytics firm LiveEO and PEFC for EUDR compliance.

*Carl Lundberg, Senior Account Executive & Alberta Zatta, Senior Partnerships Manager, LiveEO*

#### 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**

17.30 – 19.00 **Wine Tasting (Invite-Only) | Sponsored by FM Global**

## Wednesday 11<sup>th</sup> March

### SESSION THREE | Global View

08.30 – 09.00 **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 **Executive Panel |**

*Moderator: Dr. Veronica Schey, COO, StepChange*

*Harald Ganster, Managing Director, Prinzhorn Holding GmbH*

*Henrik Sjölund, President and CEO, Holmen*

10.10 – 10.35 **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*

10.35 – 11.00 **Presentation | European Competitiveness: cross-border trade flows, safeguarding scenarios, and consolidation analysis**

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

*Dario Accorona, Principal, BCG*

11.00 – 11.25 **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*

#### **11.25– 11.50 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*

#### **11.50 – 12.15 Networking Break**

#### **12.15 – 12.45 Panel | Transparency and Traceability: Aligning Supply Chains with EU Sustainability Requirements**

- Strategies for building transparency in supply chain sustainability.
- Collaborative approaches to ensure responsible sourcing across global value chains.
- Key factors and ethical considerations shaping procurement decisions.
- The role of ESG in driving accountability and sustainability goals.

*Moderator: Luis Sucupira, Global Forest Products Consultancy, Fastmarkets*

*Maja Drca, EU Representative, PEFC International*

*Dr Liz Wilks, Head of Sustainability & Public Affairs Europe, Asia Pulp & Paper  
FSC Representative*

### **SESSION FOUR | Shaping What's Next**

#### **12.45 – 13.10 Graphic Paper Outlook**

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

#### **13.10 – 13.35 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*

#### **13.35 – 14.30 Networking Lunch**

#### **14.30 – 14.55 Presentation | Competitiveness Under Pressure: Regulation, Resilience, and the Future of Tissue in Europe**

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

*Carlos Reinoso, General Manager, European Tissue Symposium*

#### **14.55 – 15.20 Tissue Market Outlook**

*Philipp Jaki, Economist, Fastmarkets*

#### **15.20 – 15.45 Panel | Veolia**

#### **15.45 – 16.10 Pulpwood Outlook**

- Examining the international woodchip trade
- Analyzing how China has become the largest woodchip-importing country and how it has affected the global woodchip market.
- Assessing the importation of woodchips into Europe and future challenges.
- Overview on the global forest resources to supply the Asian and European woodchip demand.
- Key takeaways.

*Marcos Madruga, Analyst, 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.

*Moderator: Natasha Valeeva, Sr. Analyst – Packaging Food & Agribusiness, Rabobank*

#### **17.10 – 17.15 Closing Remarks**