



FEDERAZIONE
CARTA E GRAFICA

**Federation of the Industry Associations for Paper,
Printing, Converting and related Technologies**

— 2023 —

OUR SHARED INTERESTS ARE THE VALUES WORTH THE MOST



#protectingtheindustry



#projectindustry4.0



#sustainabilityproject

INSTITUTIONAL ACTIVITY

The Federation's mission is to overlook the sector's interests, dealing directly with Italian institutions and actively participating in Confindustria. This activity leverages the Federation's overall numbers in terms of the economic role and the representation of the industry, which are far higher than the three Associations' numbers individually. The Associations continue to operate across Europe by participating in their partner organizations, adopting an approach that is increasingly beneficial in terms of coordination as a federation. In these settings the Federation works in collaboration with Comieco, with the priority of defending and adding value to the consortium system, **ensuring the growth of the circular economy** in which paper plays a leading role.

The Federation's institutional activity translates in a prompt **monitoring of all legislative action** and in preventive, participatory, and, if necessary, corrective actions towards those rules and documents that specifically impact the interests and activities of the sectors it represents. To mention some examples of the Federation's most recent activity: the recognition of the strategic and essential role of the supply chain, which led to the **preservation of operational continuity** during the spring 2020 lockdown, as well as the indication of our sector as a "flagship for circular economy", with **dedicated allocated funds within the PNRR** (National Recovery and Resilience Plan); the monitoring of fundamental legislation, such as the **implementation of the EU packaging directives**, including **new rules on labeling**, and the specific **"End of Waste" decree** for paper and cardboard; the **plastic tax** and the **implementation of the SUP Directive in Italy**, specifically in regard to protecting cellulose-based packaging, as well as flexible packaging; intensive ongoing work on the **Proposal for a Regulation on packaging and packaging waste (PPWR) made by the European Parliament and the European Council**; activities to help editorial items (from the **"Culture Bonus"** for eighteen-year-olds, to **tax credit on advertising investments**) and publishing companies (from legislation on early retirement to tax credit on paper). Worth mentioning is also the specific scenario at the end of 2021 and in the first months of 2022, with the **energy crisis and the shortage of raw materials**, at first due to the pandemic situation and then to the Russian – Ukraine conflict.

INSTITUTIONAL COMMUNICATIONS

In addition to providing media visibility - via press releases, newsletters, social media - to its institutional activity, the Federation also handles the required communication for **three core issues which have been identified as of specific interest to all the sectors** it represents.

Giving paper its right value, as a natural, recyclable, and recycled material

All too often paper is the **target for negative misconceptions**. The Federation is committed to debunk these false myths with specific actions towards various targets, such as consumers (see the **"Love Paper" project**), opinion leaders (see the **Two Sides project**), and the institutions. These actions aim to further enhance the value of a natural material that comes from sustainably managed forests, is biodegradable and plays a leading role in intensive recycling activities. Even paper for domestic and sanitary use is **important for the hygiene** in our homes, in the food service industry, and in medical and hospital environments.

Promoting reading and reading on paper

A large part of human knowledge is still stored and kept on long-lasting, reliable paper. Italian statistics show that countries where people don't read (both books and newspapers) or read very little, are held back by a cultural gap that impedes social and economic growth. Furthermore, **reading on paper improves concentration, it's an excellent learning aid, and is an act which must therefore be supported and promoted**, especially among the younger generations who are drowning in digital excess. Even **printed adverts are still among the most highly impacting and effective**.

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#naturesfriend



#betteronpaper



#sustainablefriend

The importance of packaging

By reducing waste, packaging plays an extraordinary economic, environmental, and social role. Designed with the proper weight/protection balance, developed to be recyclable and compostable, and made from sustainable raw materials, **paper and cardboard packaging is a tool in the hands of society which also helps the environment. Flexible packaging, by far the lightest, protects food and its shelf life**, thereby helping the fight against food waste.

SERVICES, DIGITAL TRANSITION, AND GREEN TRANSITION

The Federation does not merely represent the supply chain within institutional settings, but it is also the tool that enabled the three Associations to create **important strategic synergies to offer a continuously improving service to its members**. The Federation provides universal themes on which the three structures collaborate: **food contact, internationalization, energy, and training**. In regard to training, new ITS course projects have been launched, and comprehensive **courses in the food contact field** have been developed and specifically designed for the demands of the sector's companies. The Federation also offers **Press Review services** and a **legislative action monitoring** to all member companies. As part of the Federation's work, two important projects have been developed in recent years, aimed at supporting companies through the two great strategic challenges of the decade for all manufacturing industries: the **digital transition**, with the adoption of Industry 4.0 standards, and the **green transition**, with the adoption of sustainability criteria in business management.

Industry 4.0 Project

Federazione Carta e Grafica has embraced the philosophy of the fourth industrial revolution with the precise goal of **promoting the sector's technological development and helping it adopt new technologies**. It has done this through its **Industry 4.0 Project**, developed in 2018 in partnership with **SDA Bocconi**, and aimed at: **raising the companies' awareness on Industry 4.0 issues** (starting with fiscal opportunities, but also looking at the profound cultural and managerial challenge that this paradigm involves) by mapping the sector and establishing a personalized check-up of the sector's companies, specifically designed for the paper and graphics supply chain; **supporting companies with specific instructions** breaking down Industry 4.0 paradigms for the paper and printing sector, then helping those companies **make improvements** when necessary (executive training; consultancy support on site, aimed at establishing and setting a specific improvement path).

Sustainability Project

By now companies are fully aware that **pursuing sustainability helps them gain market strength**, but most importantly it can help them understand their companies better and improve their reputation and positioning. Therefore, **in collaboration with BDO and the Forum for Sustainable Finance, Federazione Carta e Grafica launched its Sustainability and Circular Economy Project** in 2020, to offer practical and operational support to its member companies, providing them with a specific tool for environmental, social, and economic reporting. As of 2022 **this tool – called FpS-TOOL – is available to all member companies** and assists them via: **a framework for monitoring and reporting environmental, social and economic performances** that meet the main international standards and comply with the guidelines of the most authoritative Italian, European and international sources in regard to sustainability and circular economy issues, in line with sustainable finance standards; **an online platform tool for basic reporting (level 1)**, aimed at SMEs that have just begun to monitor sustainability, **and for advanced reporting (level 2)**, dedicated to companies that want to draw up a Sustainability Report, consulting the framework that the Federation offers. In 2022, **this project earned the Federation an award by Confindustria, as Best Sustainability Performer**.



ABOUT US



ASSOCARTA (Association of the Italian Pulp, Paper, and Board Industry) was founded on 11 May 1888 with the aim of "protecting the Italian paper industry and trade". The Association, a member of Confindustria, today aims to coordinate and promote the interests of every sector of the paper industry in which the member companies operate and to protect them both at national and European level through CEPI, the Confederation of European Paper Industries (www.cepi.org), of which he is a founding member. During the pandemic the role of the Italian paper industry's products was recognized. Ditto for the key role it plays in the country's circular economy and ecological transition, owing to its environmental and circular performance, also recognized in the National Recovery and Resilience Plan (Piano Nazionale di Ripresa e Resilienza, PNRR).

assocarta.it



ASSOGRAFICI (Italian Association of Printing and Paper Converting Industries) has been a member of Confindustria since 1946 and represents the printing, paper converting and flexible packaging industry. It is connected to the European federations Intergraf and Citpa. Assografici negotiates and signs labor union agreements and collective labor contracts for the industrial sectors it represents. It also oversees relations with the Supplementary Health Care Fund and the Supplementary Pension Fund, participates through Comieco in the Conai Consortium System, promotes education and professional training initiatives, and assists its members by providing general and specialist services. Assografici is also divided into special interest Groups (Wallpaper, Security Printing, Folding Cartons, Corrugated Board, Flexible Packaging, Self-Adhesive Labels, Sacks, Tubes and Shopping Bags) to provide continual 'vertical' support for companies operating in the same market.

assografici.it



ACIMGA is the Association of Italian printing and converting machinery industry. Since 1947 we have represented all printing, packaging and converting technologies for all applications and all types of materials. The association is the focal point of the sector in Italy and abroad, representing 'Brand Italy', meaning not only machines that are produced in Italy, but the entire knowledge system that originated in Italy and represents the hallmark of these technologies wherever they are produced. The association carries out lobbying activities, follows institutional and parliamentary activities in support of the sector and monitors legislative action to safeguard the sector's interests. ACIMGA is also part of a national and international network that provides various services to members and effective global promotion of the industry. It includes Confindustria, Federmacchine, Istituto Italiano Imballaggio, Fondazione Carta Etica del Packaging, Intergraf, GlobalPrint and Italian Technology Centre.

acimga.it

Associated members



Comieco is the National Consortium for Recovery and Recycling of Cellulose-based Packaging. This non-profit organization aims to ensure the recycling and recovery of paper and board and promote their use in a circular economy. The Consortium includes producers, importers of raw materials, converters of raw materials into cellulose packaging, and recyclers and recoverers. The Consortium makes agreements with local authorities, and under the Anci-Conai framework agreement coordinates the system for the collection and recycling of paper and board from municipal separate waste collection.

comieco.org



Unione Industriali Grafici Cartotecnici della Città metropolitana di Milano (Union of the Printing and Paper Converting Industries of the province of Milan) represents the printing, paper and board converting and flexible packaging industries active in the Milan area and is a privileged point of access to the Confindustria System, thanks to special agreements with Assolombarda and Assografici. It offers its member companies various services in the following areas: labor relations, training and information tailored to the industry. The Union, founded in 1945, is typical of the associative culture that has shaped Milanese business, a world leader.

unione.gct.mi.it

FEDERAZIONE CARTA E GRAFICA

THE PAPER AND GRAPHIC INDUSTRY, A MADE IN ITALY EXCELLENCE

The Italian paper industry is the second largest in Europe, soon after Germany, **with 10.3% of the total volumes in the area**. Looking at the different types, it is the absolute leader in the production of domestic, hygiene and sanitary papers, accounting for 20,1% of European production, it is in second place for wrapping paper, with 12,5% of the European production, and it is third in paper and paperboard for packaging and other specialities, with shares respectively of 9,8% and 10,5% of the volumes produced in Europe.

The Italian printing and converting machinery industry is third in the global ranking, with a market share around 10% and with a stable growth trend; specifically, Italy is world leader in rotogravure and flexographic printing machines as well as paper and converting machines. The sector's trade balance in 2022 is at €1.015 million. The industry is **strongly export-oriented** and mainly consists of small and medium-sized companies that have made flexibility and specialized production their strong features, which are recognized and appreciated internationally.

The Italian printing industry is second in Europe for turnover, after Germany, **with a 14.8% market share, and second also in terms of number of companies and employees**. The trade balance of the printing sector in 2022 is confirmed as positive, increasing significantly to €777 million. The products of Italian excellence are advertising and commercial printed items (such as catalogues, brochures and leaflets), magazines, books (including art books) and forms.

The Italian paper converting industry is second in Europe for turnover, after Germany, **with a 16.9% market share, first for companies and second for employees**. It is export-oriented, with a positive trade balance which grew significantly in 2022 to €2,613 million. It is the second-largest corrugated cardboard producer in the EU and excels in the production of flexible packaging, folding cartons, sacks, shopping bags, self-adhesive labels, tubes, wallpaper, paper bank notes and gift items.

FEDERAZIONE CARTA E GRAFICA

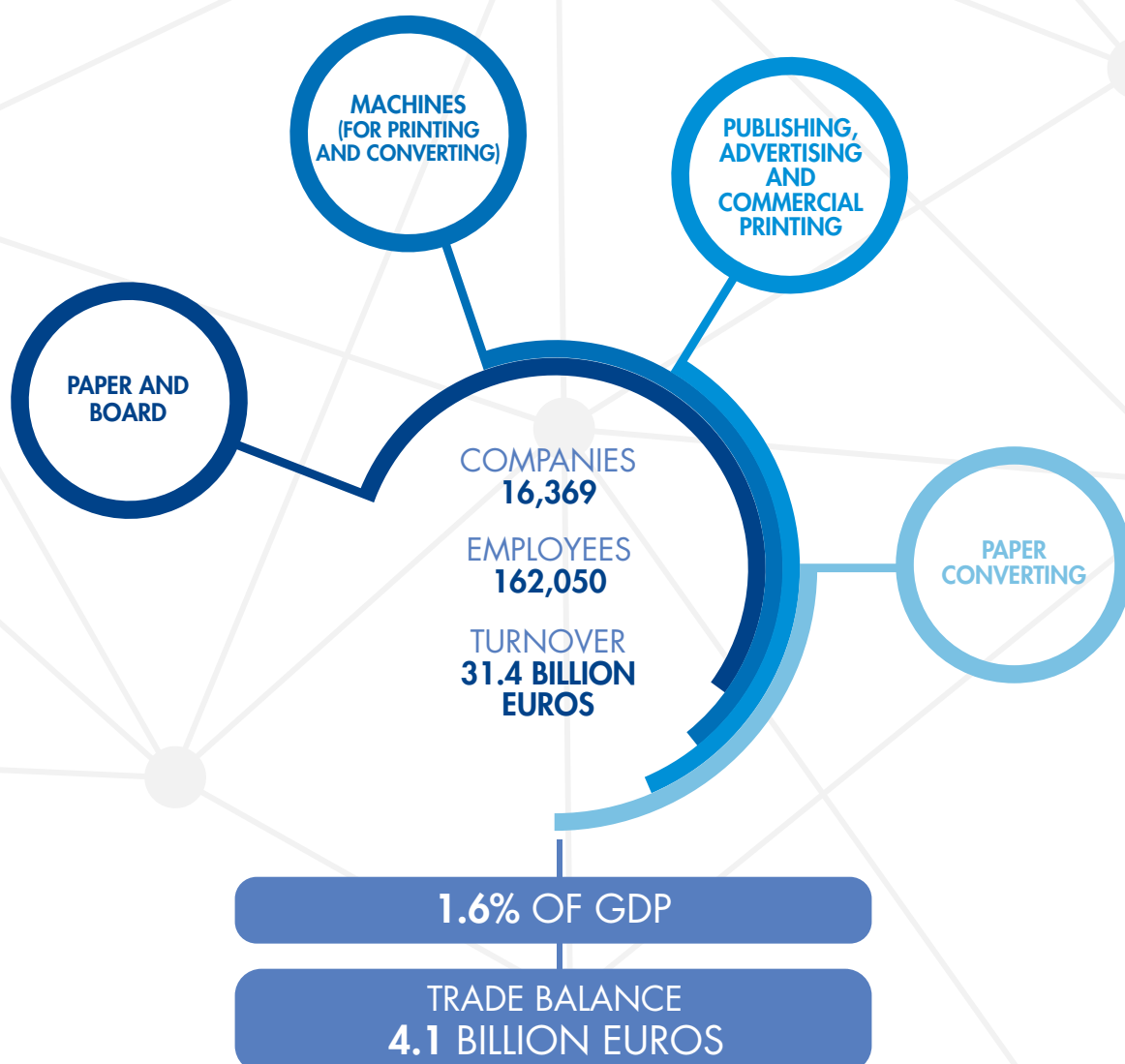
CIRCULAR ECONOMY LEADERS

Paper is an example of circular bio-economy as it combines sustainability with the use of renewable raw materials and the recycling of end-of-life products. In fact, **paper is renewable, recyclable, biodegradable and compostable**. The Italian paper industry has always paid great attention to the importance of giving new life to used paper and board, reusing them in its production, thus anticipating the concept of circular economy.





Products deriving from forests, such as paper, are an important incentive for the promotion of an effective management of forest resources. The availability of wood fiber, the key raw material used in the paper manufacturing process, depends entirely on the effective management of forest resources. **Around 90% of wood fiber purchased by the European paper industry comes from European forests, which are constantly growing, at the rate of 1,500 football pitches in size every day**. Since the 1950s, the forest area in Europe has increased by 30%.

After Germany, Italy is in second place in Europe for the volume of paper for recycling used annually in its productions. Currently, nearly **62% of paper and board produced in Italy is made from recycled fibers**, and for some products (paper and board for corrugated cardboard) recycled paper is the only raw material. **Recycling rates in the packaging sector exceed the target value of 80%**, set for 2025 by the EU Directive and in line with the 85% target for 2030.

STRUCTURE AND OVERALL RESULTS 2022



RESULTS BY SECTOR 2022

	 PAPER	 MACHINES (FOR PRINTING AND CONVERTING)	 PRINTING	 PAPER CONVERTING	TOTAL
COMPANIES	119	250	12,900	3,100	16,369
EMPLOYEES	19,000	8,500	72,150	62,400	162,050
TURNOVER (EUR million)	11,150	2,945	6,789	10,547	31,431
TRADE BALANCE (EUR million)	-352	1,015	777	2,613	4,053

2022 PERFORMANCE SUMMARY

Paper Industry

% changes over 2021

PRODUCTION BY TYPE

TURNOVER	+37.1%	↑	PAPERS FOR GRAPHIC USE PURPOSES	-13.2%	↓
PRODUCTION	-9.1%	↓	PACKAGING PAPER AND BOARD	-10.0%	↓
EXPORT (val.)	+32.8%	↑	HOUSEHOLD AND SANITARY PAPER	+0.3%	↑
EXPORT (qty)	-11.2%	↓	OTHER SPECIALTIES	-12.7%	↓

Printing and Converting Machinery Industry

% changes over 2021

EXPORT BY TYPE

TURNOVER	+7.3%	↑	CONVERTING MACHINES	+4.6%	↑
INTERNAL DELIVERIES (val.)	+5.8%	↑	PRINTING MACHINES	+12.8%	↑
EXPORT (val.)	+8.4%	↑	MOULD PREPARATION MACHINES	+26.7%	↑
			PAPER CONVERTING MACHINES	+17.8%	↑
			BOOKBINDING MACHINES	-3.5%	↓

Printing Industry

% changes over 2021

PRODUCTION BY TYPE

TURNOVER	+13.5%	↑	EDITORIAL PRINTING	-8.0%	↓
PRODUCTION	-11.4%	↓	ADVERTISING AND COMMERCIAL PRINTING	-18.1%	↓
EXPORT (val.)	+22.3%	↑			
EXPORT (qty)	-12.0%	↓			

Paper Converting Industry

% changes over 2021

PRODUCTION BY TYPE

TURNOVER	+25.5%	↑	PACKAGING (PAPER, BOARD AND FLEXIBLE)	-3.3%	↓
PRODUCTION	-3.1%	↓	PAPER CONVERTING	-0.9%	↓
EXPORT (val.)	+31.2%	↑			
EXPORT (qty)	+2.2%	↑			

FEDERAZIONE CARTA E GRAFICA

Founded in June 2017, the Federation of the Industry Associations for Paper, Printing, Converting and related Technologies represents the industrial sectors and associates member companies of Acimga (graphic, converting and paper machines), Assocarta (paper and board) and Assografici (printing, paper-converting and flexible packaging), with Unione GCT (the Association of the Printing and Paper Converting Industries of the province of Milan) and Comieco (the Consortium for the recovery and recycling of cellulose-based packaging) as associated members.

The Federation aims to achieve the objectives that inspired the Pesenti Reform and the organizational evolution of Confindustria: to **represent the interests** of similar business categories by sector; to achieve **organizational synergies** by reducing functional overlaps and duplications; and to create **a single entity that is broader and more representative**.

The Federation is led by the **President** and the **General Council**, while the structure is coordinated by the General Manager of the Federation and a **Committee comprising the three General Managers of the single Associations**.

Thus, it seeks to preserve the identity of the three Associations and their strong relationship with their member companies and pursue federal objectives through **the establishment of common governance bodies and use of organizational coordination mechanisms**.



FEDERAZIONE
CARTA E GRAFICA

President: Michele Bianchi

Vice President: Daniele Barbui

General Council:

Emilio Albertini, Carlo Emanuele Bona (Past President), Marco Calcagni,
Gianluca Castellini, Enrico Fenotti, Lorenzo Poli

General Manager: Maurizio D'Adda

Coordination committee:

Enrico Barboglio, Maurizio D'Adda, Massimo Medugno

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