



FEDERAZIONE
CARTA E GRAFICA

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

— 2025 —

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”. Today, the mission of the Association – a member of Confindustria – is to coordinate and promote the interests of every sector of the paper industry in which its member companies operate, and protect these interests on both a national and European scale through CEPI, the Confederation of European Paper Industries (www.cepi.org), of which it is a founding member. The essential role of the Italian paper industry products became more evident than ever during the pandemic, as did the part it plays in the country’s circular economy and environmental transition due to the renewable, circular nature of its products – attributes that are also recognised in Italy’s National Recovery and Resilience Plan (PNRR). The association is, alongside representatives of other energy-intensive sectors, a member of the Confindustria energy demand board.

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 affiliated with the European federations Intergraf and Citpa. Assogracifi negotiates and undersigns labour union agreements and collective labour 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. Assogracifi is also subdivided into a number of Specialised Product Category Groups (Wallpaper, Security Printing, Folding Cartons, Corrugated Board, Flexible Packaging, Self-Adhesive Labels, Sacks, Tubes and Shopping Bags) allowing the association to provide continual “vertical” support to business operating in the same market.

assogracifi.it



ACIMGA is the Association of Italian manufacturers of printing, converting and other related machinery. Since 1947, the association represents all printing, packaging and converting technologies for all applications and all types of materials. The association plays a key reference role for the industry, both in Italy and internationally, representing the “Made by Italy”, meaning not just machinery produced in Italy, but the wealth of competence and expertise unique to our country, which is the trademark of these technologies, regardless of where they are manufactured. Acimga carries out lobbying activities, oversees institutional and parliamentary activities in support of the supply chain, monitors legislative actions in the interests of the industry. Acimga is also part of a national and international network aimed at providing a wide range of services to member companies as well as an effective global promotion of the industry, which include Confindustria, Federmacchine, the Italian Packaging Institute, the Packaging Ethical Charter Foundation, GlobalPrint and the Italian Technology Centre.

acimga.it

Associated members



COMIECO is a nonprofit organisation founded in 1985 by a group of businesses operating in the paper sector to promote the concept of “environmental packaging”. With the enactment of Italian Law Decree 22/97, COMIECO was established as the National Consortium for the Recovery and Recycling of Cellulose-based Packaging. This consortium now has over 3000 member businesses, including paper producers, converters of raw materials, cellulose packaging producers and constructors of recycling systems. The Consortium stipulates agreements with local authorities and, under the ANCI-CONAI framework agreement, coordinates the system for the collection and recycling of paper and cardboard from municipal separated waste collection centres. Through an effective policy of prevention and development activities, the Consortium has contributed to more than tripling the amount of paper and cardboard recovered through separated waste collection in Italy from 1 to 3.7 million tonnes, not only meeting but surpassing the targets set for recycling cellulose-based packaging waste set by EU regulations years in advance.

comieco.org



UNIONE GCT MILANO (Union of the Printing and Paper Converting Industries of the province of Milan) represents the printing, paper and cardboard converting and flexible packaging industries active in the Milan area, and offers its members privileged access to the Confindustria system through special bilateral agreements with Assolombarda and Assogracifi. The organisation provides its member companies, which represent the lion’s share of the sector in the Milan area, with labour relations services, training initiatives and information specific to the industry. The Union, founded in 1945, is a typical example of the associative culture that has helped shape the entrepreneurial sector of the city of Milan, which still sets the global standards today.

unione.gct.mi.it

OUR SHARED INTERESTS ARE THE VALUES WORTH THE MOST



#protectingtheindustry



#projectindustry4.0



#sustainabilityproject

INSTITUTIONAL ACTIVITY

The Federation's mission is to represent and uphold the interests of the sector, liaising directly with Italian institutions and participating actively in Confindustria. Its activities leverage the Federation's overall numbers in terms of the economic importance and representative role of the industry as a whole, which far exceed those of its three constituent Associations considered individually. The Associations also operate on a Europe-wide scale by participating in their partner organizations, adopting an approach that is increasingly beneficial in terms of coordination as a federation. In this context, the Federation works in collaboration with Comieco, with a priority on defending and building value for the consortium system to ensure the growth of the **circular economy** in which paper plays a leading role. The Federation's institutional activities therefore consist in the constant **monitoring of all legislative action** and in taking prompt preventive, participatory, and, if necessary, corrective action with respect to those regulations and documents which specifically impact the interests and activities of the sectors it represents. Some examples of the Federation's most recent activities include: the acknowledgement of the strategic and essential role of the supply chain, which contributed to **ensuring operational continuity** during the spring 2020 lockdown, and the recognition of our sector as a "flagship for the circular economy", with **dedicated allocated funds within the PNRR (National Recovery and Resilience Plan)**; monitoring of fundamental legislation, such as the **implementation of the EU packaging directives**, including **new rules on labelling**, 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 and flexible packaging; the **new EUDR regulation** and the process now under way to simplify it; activities to support editorial products (from the **"Culture Bonus"** for eighteen-year-olds to **tax credits for advertising investments**) and publishing companies (from legislation on **early retirement** to **tax credits for paper**). The most effective example of how the federation model ensures the unity and strength necessary to protect the interests of the supply chain is the work done over the past three years with regard to the **packaging and packaging waste regulation (PPWR)**: this work is of extreme relevance and has a major impact on the sectors represented, which has seen the Federazione Carta e Grafica play a key role in Confindustria and in relations with the Italian government to help steer the regulation towards a solution which will uphold the interests of the Italy and its advanced circular economy. In parallel with this, the Federation has also been very active in Brussels in promoting and encouraging stronger coordination on a Europe-wide scale between the various European associations representing this industry. **This work has led to the creation of a legislative text which protects cellulose-based packaging and acknowledges the specific advantages of paper as a material – a renewable, recyclable and compostable bio-material – and will ensure that it is effectively recycled. The federation continues to work on all the fundamental delegated acts and the operational application of the new regulation.**

INSTITUTIONAL COMMUNICATION

In addition to ensuring the media visibility – through press releases, newsletters and social media – of its institutional activities, the Federation also handles all the communication instrumental to the **three core issues which have been identified as of specific interest** to all the sectors it represents.

Ensuring that the value of paper is rightfully recognised as a natural, recyclable, and recycled material

All too often, paper is the **subject of negative misconceptions**. The Federation is committed to debunking these misconceptions with specific actions targeting end consumers (such as the **"Love Paper"** project), opinion leaders (such as the **"Two Sides"** project), and the political world. These actions aim to raise awareness of the value of a natural material that is sourced from sustainably managed forests, is biodegradable, and plays a leading role in intensive recycling activities. Even paper for domestic and sanitary use serves **an important function for hygiene** in our homes, in the food service industry, and in medical and hospital applications.

Promoting reading and reading on paper

A significant proportion of human knowledge is still stored and kept on long-lasting, reliable paper. Italian statistics show that countries where people do not read (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 and is an excellent learning aid, and is therefore an activity which must be protected and promoted**, especially among the younger generations overwhelmed by digital excess. To identify the right balance between paper and digital media and stimulate discourse on the topic and the actions necessary, since 2024, the **Federation has collaborated actively in the Paper, Pen & Digital Observatory project of the Fondazione Luigi Einaudi**. The first major results of these activities have been a number of recent operational measures implemented by the Ministry of Education and Merit, the launch of an educational project in schools in collaboration with Cepell, and the establishment of a parliamentary intergroup. For years, the Federation has encouraged and supported reading on paper media and promoted the printing industry by collaborating with Bookcity and taking part in the major national (Turin) and international (Frankfurt) expos in this sector.

OUR SHARED INTERESTS ARE THE VALUES WORTH THE MOST



#friendofnature



#betteronpaper



#sustainablefriend

Promoting quality packaging, a valuable ally for our consumer needs and the environment

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

MORE SERVICES AND COOPERATION

The Federation does not merely represent the industry in an institutional context and is also a that has allowed the three member Associations to forge **important strategic collaborative relationships for the definition and delivery of continuously improving services to its members**. The Federation defines and oversees universal themes on which the three member associations 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 tailored specifically for the needs of the companies in this sector companies. The services offered by the Federation also include a **legislative action monitoring service** provided to all member companies, and the **Scripta newsletter**, which is available free of charge from the website.

DIGITAL TRANSITION AND GREEN TRANSITION

As part of the Federation's work, two important projects have been developed in recent years to support companies through the two great strategic challenges of the decade facing 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.

The Industry 4.0 Project

Federazione Carta e Grafica has embraced the philosophy of the fourth industrial revolution in full with the precise goal of **promoting technological development in the sector and helping the industry adopt new technology**. It has done this through its Industry 4.0 Project, developed in 2018 in partnership with **SDA Bocconi** with the following objectives: **raising the awareness of member companies on Industry 4.0 issues** (initially economic opportunities, but also addressing the profound cultural and managerial challenges that this paradigm shift entails) by mapping the sector and implementing a personalized check-up of the sector's companies tailored specifically for the paper and graphics industry; **supporting companies with specific "instructions for use"** addressing the individual aspects of the Industry 4.0 model for the paper and printing sector and then helping companies make improvements where necessary. **Recently, the Federation has played an active role in promoting "Transition 5.0", which aims to reconcile technological development with the pursuit of greater sustainability in business.**

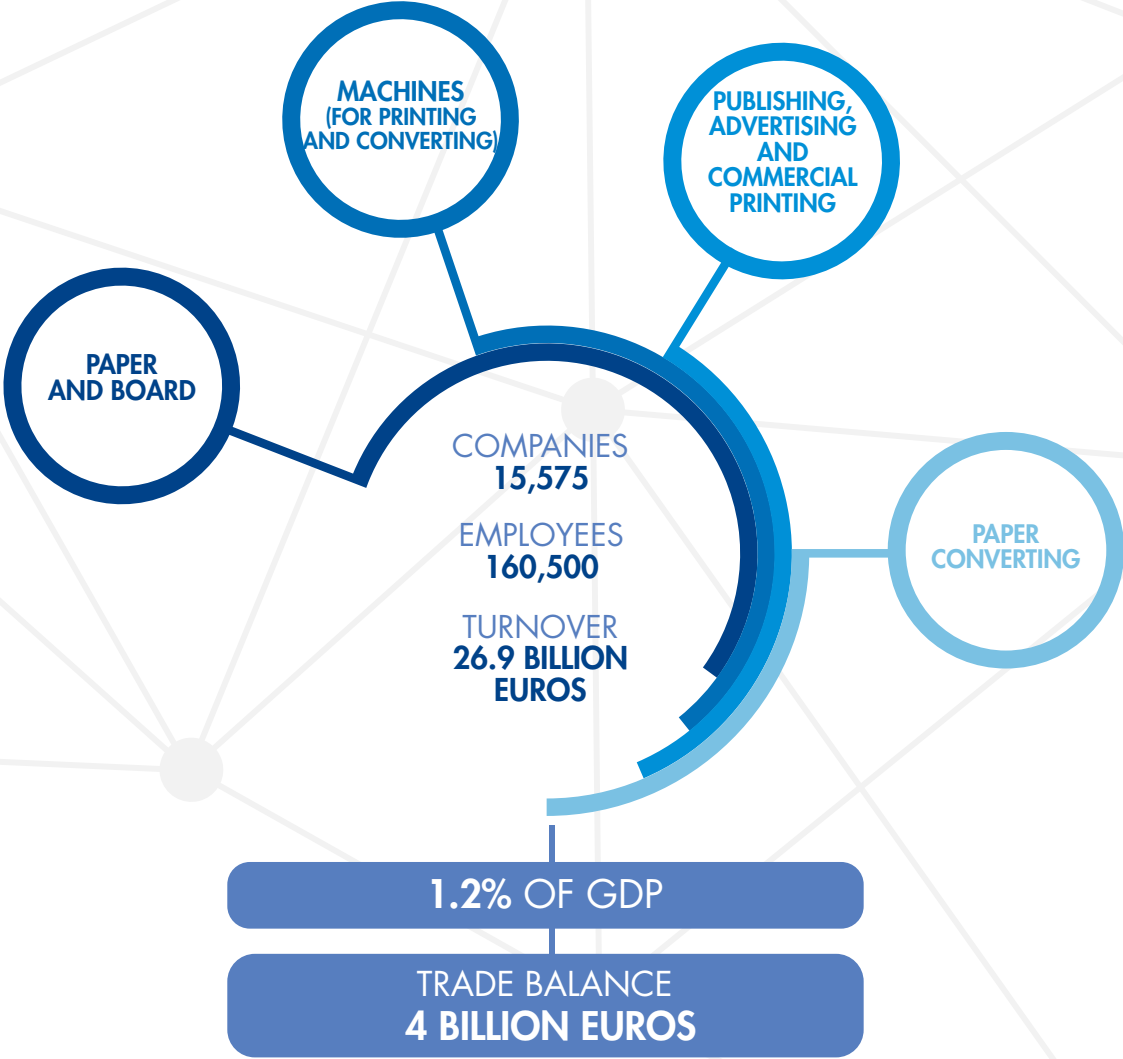
The Sustainability Project

Correctly identifying and evaluating environmental, social and governance impact have become indispensable requisites for companies to consolidate their position in the market, be more competitive and take advantage of economic opportunities. This is why Federazione Carta e Grafica, **in collaboration with BDO and the Forum for Sustainable Finance, launched the Sustainability and Circular Economy Project** in 2020, an initiative intended to offer practical and operational support to its member companies by providing them with a specific tool for environmental, social, and governance reporting. This tool, denominated **FpS-TOOL**, has been online since 2022, and consists of: a **documentation framework** to support the monitoring and reporting of environmental, social, governance and economic performance indicators; and **an online platform offering two levels of reporting**, with a more basic level for SMEs and a more advanced level for large companies. Between 2023 and 2024, the Federation put its commitment to promoting a culture of sustainability into action by organising **an extensive programme of webinars** addressing the key topics related to measuring, monitoring and communicating sustainability performance, as well as ESG reporting. **In 2025, Level 1 of FpS-Tool was completely revised to comply with the EU reporting standards (VSME) applicable for SME businesses.** In addition to VSME standards, this level now requires a number of additional items of information to better represent the unique characteristics of this sector. This means that this reporting level of the Federation's online platform now allows member companies to report their performance in complete observance of the requirements of the market, the authorities and financial bodies. Furthermore, Level 1 has been extended to include an integrated function which analyses the indicators populated by all member companies – both large businesses subject to mandatory reporting and SME businesses making use of this level to comply with VSME standards – in aggregate form to produce an association report. **This is a document of fundamental importance offering a benchmark for the industry and providing an overview of its ESG performance as a whole.**



FEDERAZIONE CARTA E GRAFICA

STRUCTURE AND OVERALL RESULTS 2024



RESULTS BY SECTOR 2024

	<div><div>PAPER PRODUCTION</div><div></div></div>	<div><div>MACHINES (FOR PRINTING AND PAPER CONVERTING)</div><div></div></div>	<div><div>PRINTING</div><div></div></div>	<div><div>PAPER CONVERTING</div><div></div></div>	TOTAL
COMPANIES	115	250	12,250	2,960	15,575
EMPLOYEES	19,000	9,100	68,800	63,600	160,500
TURNOVER (EUR million)	8,280	3,200	5,805	9,642	26,927
TRADE BALANCE (EUR million)	-73	1,275	585	2,216	4,003

2024 PERFORMANCE SUMMARY

Paper Industry

% changes over 2023

TURNOVER	+1.5%	↑	PAPERS FOR GRAPHIC USE PURPOSES	+11.2%	↑
PRODUCTION	+6.2%	↑	PACKAGING PAPER AND BOARD	+5.7%	↑
EXPORT (Val.)	+2.4%	↑	HOUSEHOLD AND SANITARY PAPER	+4.6%	↑
EXPORT (Qty)	+11.2%	↑	OTHER SPECIALTIES	+2.2%	↑

Printing and Converting Machinery Industry

% changes over 2023

TURNOVER	+4.9%	↑	CONVERTING MACHINES	+9.4%	↑
INTERNAL DELIVERIES (Val.)	+10.7%	↑	PRINTING MACHINES	-9.5%	↓
EXPORT (Val.)	+0.9%	↑	MOULD PREPARATION MACHINES	-7.6%	↓
			PAPER CONVERTING MACHINES	-10.8%	↓
			BOOKBINDING MACHINES	+3.1%	↑

Printing Industry

% changes over 2023

TURNOVER	-3.4%	↓	EDITORIAL PRINTING	+8.6%	↑
PRODUCTION	-1.6%	↓	ADVERTISING AND COMMERCIAL PRINTING	-5.3%	↓
EXPORT (Val.)	+9.1%	↑			
EXPORT (Qty)	+4.6%	↑			

Paper Converting Industry

% changes over 2023

TURNOVER	-3.3%	↓	PACKAGING (PAPER BOARD AND FLEXIBLE)	+2.3%	↑
PRODUCTION	+2.4%	↑	PAPER CONVERTING	+3.1%	↑
EXPORT (Val.)	-2.2%	↓			
EXPORT (Qty)	+5.0%	↑			

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ITALIAN EXCELLENCE

The Italian paper industry is the third largest in Europe, after Germany and Sweden, **accounting for 10.2% of total volumes in this area**. In terms of individual product categories, Italy is the outright leader in the production of domestic, hygiene and sanitary papers, accounting for 20.4% of European production, and is the third largest producer of paper and cardboard for packaging and other specialised applications, with a market share of 9.7% of the volumes produced in Europe.

The Italian printing and converting machinery industry is the third largest globally and second in Europe, with a market share around 10% and a stable growth trend; specifically, Italy is world leader in rotogravure and flexographic printing machines as well as paper and converting machines. In 2024 the Italian industry registers a +4,9% expansion in turnover, standing at €3.2 billion, with the industry's trade balance improving significantly over the previous year, to €1.275 billion. The Italian industry is **strongly export-oriented**, and it is mostly comprised of medium to small enterprises, which have flexibility and high-specialisation as their main strength; those are attributes which are acknowledged and appreciated globally.

The Italian printing industry is second largest in Europe for turnover, after Germany, **with a 16.1% market share, third in terms of number of companies and second with regard to workforce**. The turnover for the Italian industry in 2024 amounted to €5.805 billion. The trade balance for the Italian printing sector in 2024 – a difficult year for the national market (but with increasing sales of books) – was very positive, growing substantially over the previous year to over €585 million. The categories where the Italian printing industry excels are advertising and commercial printed matter (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 market share of 17.6% (up over 2024)**. **The industry is the leader in Europe in terms of number of businesses and second in Europe in terms of workforce**. The turnover for the Italian industry in 2024 amounted to €9.642 billion. The sector is **heavily export-oriented** (38% of turnover) with a trade balance for 2024 which, while slightly down over the previous year, was still very positive at €2.216 billion. The Italian paper converting industry is the second-largest producer of corrugated cardboard producer in the EU and excels in the production of flexible packaging, folding cartons, sacks, shopping bags, self-adhesive labels, tubes, wallpaper, security printing and gift items.

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LEADERS OF THE CIRCULAR ECONOMY

Paper is an example of a circular bio-economy as it combines sustainability with the use of renewable raw materials and the recycling of end-of-life products. Indeed, **paper is renewable, recyclable, biodegradable and compostable**. The Italian paper industry has always been very aware of the importance of giving new life to used paper and board, reusing these materials in its production processes and pioneering the concept of circular economy.

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

After Germany, Italy is in second place in Europe for the volume of recycled paper used annually in production. Currently, **66% of paper and cardboard produced in Italy is made from recycled fibre**, and for certain products (paper and card stock for corrugated cardboard), recycled paper is the only raw material used. **Recycling rates in the packaging sector are now 92%**, already exceeding the EU targets of 80% and 85% set for 2025 and 2030 respectively



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 incorporates the associate member companies of Acimga (printing, converting and paper machines), Assocarta (paper and cardboard) and Assografici (printing, paper converting and flexible packaging), with Unione GCT Milano and Comieco as associated members

The Federation aims to achieve the objectives inspiring the Pesenti Reform and the organizational evolution of Confindustria: in short, to **represent the interests** of similar business categories by sector; to promote **organisational synergy** by reducing functional overlaps and redundancy; and to create **a single entity that is broader in scope and more representative**.

The Federation is headed by its **President** and **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**.

The organisational structure therefore strives to preserve the identity of the three constituent Associations and their strong relationship with their own member companies, and pursue the objectives of the federation through the **establishment of common governance bodies and the use of organisational coordination mechanisms**.



FEDERAZIONE
CARTA E GRAFICA

President: Andrea D'Amato

Vice Presidents: Aldo Peretti, Lorenzo Poli

General Council:

Daniele Barbui, Michele Bianchi (Past President), Carlo Emanuele Bona,
Enrico Fenotti, Marco Filauro, Carlo Montedoro

General Manager: Massimo Medugno

Coordination committee:

Enrico Barboglio, Maurizio D'Adda, Massimo Medugno

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