



FEFPEB Congress

SWEDEN 2026

Welcome to FEFPEB 2026

Mathias Fridholm

Moderator

FEFPEB congress



TODAY'S PROGRAMME



09.00
Opening

Welcome
by FEFPEB President
Rob van Hoesel



09.10
Swedish Forest
Industries Sector;
today and
in the future

Mrs Viveka Beckeman,
CEO Swedish Forest
Industries Federation



09.40
Geopolitics and
a resilient Europe

Mr Björn Fägersten,
leading geopolitical
analyst



10.20
Coffee break

in the
exhibition area



11.00
Status PPWR
implementation
and advocacy
FEFPEB

Mr Nikhil Varghese,
director Circular
Economy Group DGA



12.00
Lunch

in the
exhibition area



13.15
FEFPEB
– Activities, Priorities
and Future Strategy
of the Federation

Fons Ceelaert,
secretary general
FEFPEB



13.45
Forest certification
systems PEFC and
FSC dialogue

Moderated by
Mr Mathias Fridholm,
Senior Advisor
Swedish Wood



14.30
Coffee break

in the
exhibition area



15.00
Market developments
/ timber availability
Forecasting, valuations
and raw material availability
in key global markets

Mr Christian Nielsen,
market analyst Swedish
Wood and Swedish
Forest Industries Federation



15.40
Closure

To summarize and
conclude the meeting
Mr Rob van Hoesel,
President FEFPEB



18.00
Dinner

at Norrviken
Gardens



FEFPEB Congress

SWEDEN 2026

»Wood packaging in a resilient Europe«

30 September, 1, 2 October 2026
73rd FEFPEB congress

Rob van Hoesel

President FEFPEB



The wood packing industry in a resilient Europe

How can Europe navigate in today´s complex geopolitical landscape

Will the Swedish forest industry continue to be a resource for renewable raw material also in the future? What are the threats and opportunities?

How will global supply and demand affect the European wood packaging industry´s availability of sawn timber



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Swedish Forest Industries Sector; today and in the future

Viveka Beckeman

CEO

Swedish Forest

Industries Federation



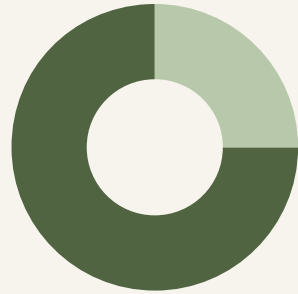
The Swedish Forest Industries

The trade organization for companies that process wood into fossil-free and renewable materials and products.

Active forestry is the key

70%

of Sweden's land area is forested.



75% of the forest is managed.



400

million seedlings are planted in Swedish forests every year.



39%

of EU's land area is forested.

1%

is harvested annually.

30,000

species of flora and fauna are found in the Swedish forest.

MORE FOREST

The total volume of trees in the forest is twice as large as it was 100 years ago.

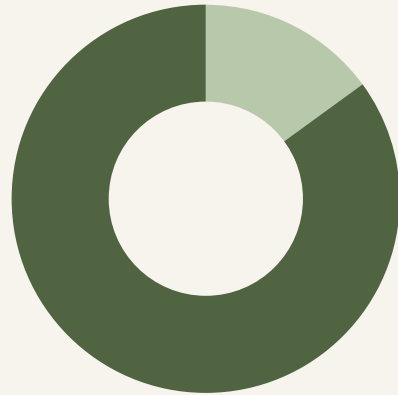
Every part of the tree is used



The forest industry contributes to national prosperity



Approximately
85% of
products are
exported.



Sweden is one of the world's leading exporters of pulp, paper, and sawn timber.

€17



billion in annual
export value (approx).

€6

billion in investments
during the period
2020–2024.

A European perspective

Why is the European Union important?

50 – 70%

of Swedish legislation originates from the EU.

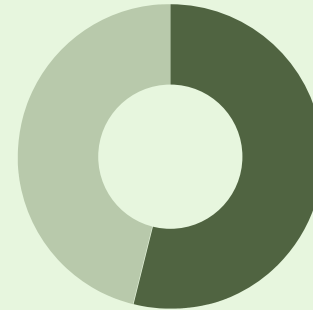
65%

of all exports are delivered within EU's internal market.



In Europe, the paper industry collected and recycled **53 million tonnes** of paper and board in 2024.

Source: CEPI



54% of Swedish market pulp is exported to the EU's internal market (24% remains in Sweden), 9% goes to the rest of Europe, mainly the UK, Turkey, and Norway (2024).



Paper and board from Sweden and Finland are largely recycled by the paper industry in continental Europe.

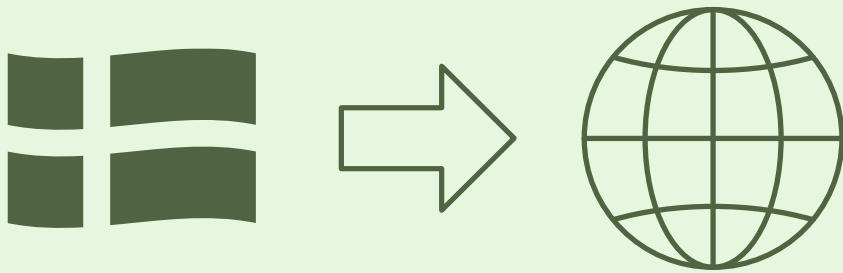
2 of 3

Swedish sawnwood products are delivered within Europe.



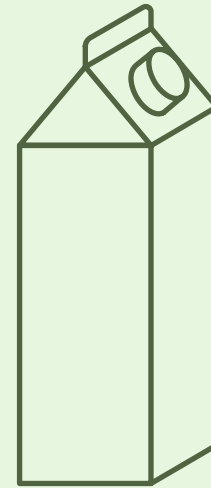
A global perspective

From Sweden to the world



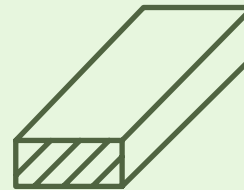
Recycled fibres are increasingly being used in paper production.

But for some food packaging and hygiene products, fresh fibres are more suitable than recycled fibres. **This means that the world needs Swedish fresh fibres**

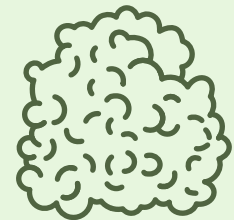


30%

of the world's **beverage carton board** is manufactured in Sweden.



Swedish exports of **sawnwood** accounts for 13 % of global trade.



Swedish pulp accounts for 6%, and **Swedish paper** 8 % of global trade.

EU's Forest legislation

- Green Deal "forest package" – Increase in forest-related initiatives and more detailed regulation

EU Green Deal and "Fit for 55"

EU Forest Strategy

EU Biodiversity Strategy

Protection of primary and old-growth forests

EUDR – Deforestation-free products regulation

LULUCF – Carbon sinks in land use and forestry

Nature Restoration Law

Renewable Energy Directive

Closer-to-nature forestry guidelines

EU Bioeconomy strategy

2040-climate targets including LULUCF

Nature and Carbon Credits

PPWR

ETS

- ★ The driving force is to strengthen the common climate and environmental policy.
- ★ Knowledge of our forestry practices and understanding of our value chains is limited.
- ★ This risks hindering the development of the forest sector.
- ★ There is a narrow focus on carbon sinks and biodiversity.

Major trends in EU

- A major shift in focus areas and political priorities compared with the previous term of government, from climate and environment to defence, preparedness and competitiveness
- Growing resistance to legislation and decisions adopted during the previous mandate period.
- Extensive simplification agenda
- Opportunities that may benefit the forest sector going forward, for example through the Bioeconomy Strategy.

EU leaders to double down on deregulation drive

Leaked document reveals top priorities for this month's European Council summit.

This is what the forest sector's climate contribution looks like in numbers

Carbon storage



In forests

54 million tonnes
CO₂e

In wood-based products

6 million tonnes
CO₂e

Reduced emissions



From the forest sector's
value chain

-4 million tonnes
CO₂e

Through substitution

63 million tonnes
CO₂e

A strong forest sector ensures European independence

How?



Resources

By securing the supply of building materials, packaging, hygiene products, and biofuels.



Capital inflow

By securing capital inflow that finances the public sector, including healthcare, education, social services, and defense.

The future still grows in the forest





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Geopolitics and a resilient Europe

Björn Fägersten

*Geopolitical analyst, Veckans Affärer,
Royal Swedish Academy of War Sciences,
European Council on Foreign Relations*





State of the Union in a contested world

How global turbulence is reshaping Europe – and where EU policy is heading

Björn Fägersten, PhD

The players – we know
The board – we sense
The rules – we don't know

The uneven path to multipolarity



1. Multipolarity?



2. Tech revolution



3. Over-dependence

USA unbound

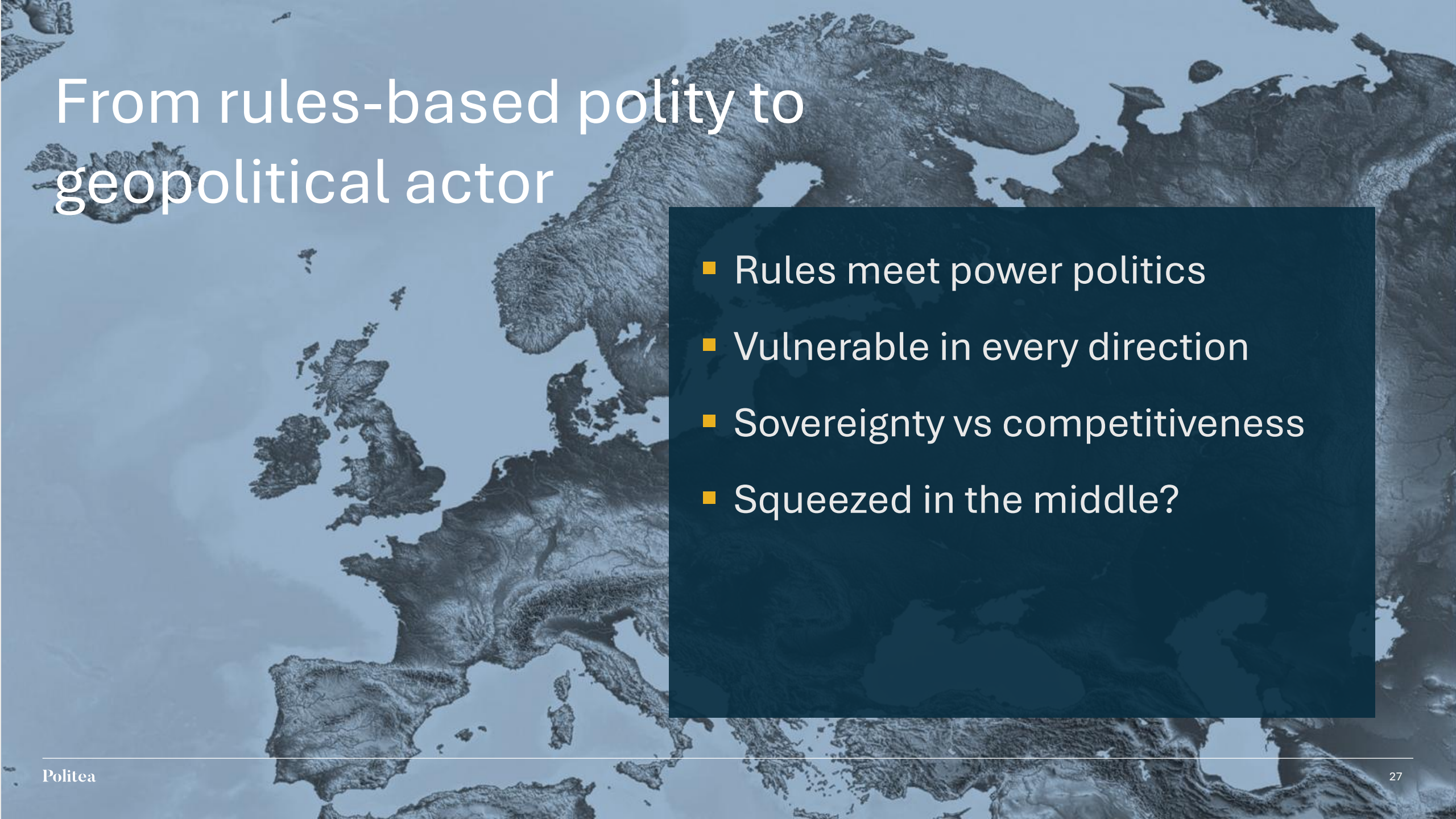
- A liberation agenda
- A China truce?
- Washington after the midterms
- America beyond MAGA





China under strain

- Weak demand at home
- Overcapacity exported
- Invented de-risking
- Builds dependencies – not order



From rules-based polity to geopolitical actor

- Rules meet power politics
- Vulnerable in every direction
- Sovereignty vs competitiveness
- Squeezed in the middle?

Policy directions

- Middle power ordering
- The resilience and sovereignty of everything
- Strength through fragmentation?
- Addressing the worst dependencies
- Take-aways for your sector

Uncertainty is the condition

Risk is a choice



At the crossroads of geopolitics, technology and business

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REA

PRINT | APPLY | MARK | VERIFY

STORTI
SINCE 1960

 GROUPE
ARCHIMBAUD

 **Woodpack
Global®**

Coralli
Group

itechSOFT

 **eirebloc**
pallet blocks made perfect

hh
mychrome
THE NEXT STEP IN PALLET PRODUCTION

 **CAPE.**

JOINTEC

 **ecoblocks**
THE PALLET BLOCK DIFFERENT BY NATURE

 **SCA**

 **Daas &
Chemicals**

 **EUROBLOCK**



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SWEDEN 2024

Coffee break

In the exhibition area – 10.20-11.00



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Status PPWR implementation and advocacy FEFPEB

Nikhil Varghese

*Director
Circular Economy
DGA Group*





PPWR: From Regulation to Reality

*What it means for wooden packaging –
and how FEFPEB is shaping implementation*

FEFPEB Annual Conference
Båstad, 2 October 2026

Today: From Compliance to Influence

01
WHAT CHANGED SINCE
PORTO?

02
WHAT APPLIES NOW?

03
WHO IS RESPONSIBLE?

04
WHERE THE OUTCOME FOR
WOOD IS STILL OPEN

05
FEFPEB: A RECOGNISED
PPWR STAKEHOLDER

06
BEYOND PPWR: THE NEXT
POLICY HORIZON



**WHAT CHANGED
SINCE PORTO?**

dga



Since Porto, three things have changed for FEFPEB

PPWR is now operational – but the implementation choices that matter most for wooden packaging are still open.

01 PPWR is now operational

WHAT HAS CHANGED

Since 12 August, conformity, traceability, role allocation and EPR are operational business issues – not future requirements.

WHY IT MATTERS FOR MEMBERS

Companies need to know who is responsible, what must be documented and where implementation can differ by market.

02 The biggest wood questions are still open

WHAT HAS CHANGED

Reuse methodology and rotations, DfR, minimisation and labelling are still being translated into technical rules.

WHY IT MATTERS FOR FEFPEB

Evidence provided now can still influence future compliance costs – and whether the rules reflect real pallet flows, repair and recycling.

03 FEFPEB is closer to the decision-making

WHAT HAS CHANGED

Expert Group membership, CEN liaison, consultant engagement and Cabinet access put FEFPEB inside key implementation discussions.

WHY IT MATTERS NOW

Access creates influence only when it is backed by credible technical evidence and a coherent sector position.

COMMON THREAD The task has shifted from understanding PPWR to shaping how it works for wooden packaging.

**WHAT
MEMBERS
NEED TO DO
NOW?**



What is live now and where members should focus?

- The Regulation applies from 12 August – but conformity is assessed only against requirements that are applicable / operational at that point.

OBLIGATION	WHAT DOES IT REQUIRE?	WHO COMPLIES?
 Demonstrate conformity	Carry out (or have carried out) the Article 38 conformity assessment; compile the Annex VII technical documentation; draw up the EU Declaration of Conformity. Arts 15(1-3), 38-39 • Annex VII	MANUFACTURER
 Identify & remain traceable	Packaging must carry a type / batch / serial number or other identifying element, plus the manufacturer name / trade name / trademark, postal address and electronic contact details where available Art. 15(4-10)	MANUFACTURER
 Provide compliance evidence	Provide the manufacturer with the information and documentation needed to demonstrate conformity, including relevant technical information required under Articles 5-11. Art. 16	SUPPLIER → MANUFACTURER
 Meet substance & reuse criteria	Article 5 substance restrictions / minimisation apply. Packaging presented as reusable must satisfy Article 11 criteria; authorities can check Article 11 compliance from 12 August for reusable packaging placed on the market from 11 February 2025. Arts 5 & 11 • Commission Guidance	MANUFACTURER
 Verify imported packaging	Before placing imported packaging on the EU market, verify the manufacturer has completed the conformity assessment and technical documentation, that required documents / identification are present, and add the importer's own contact details. Art. 18	EU IMPORTER
 Fulfil Extended Producer Responsibility	Finance the management of packaging waste and comply with the applicable producer registration / reporting arrangements. Arts 44-45 • Commission Guidance	PRODUCER
 Appoint an EPR authorised representative	For a producer established in a third country, a Member State may require appointment – by written mandate – of an authorised representative for EPR when packaging or packaged products are made available there for the first time Art. 45(3)	PRODUCER 3rd-COUNTRY PRODUCER

WHO CARRIES THE RESPONSIBILITY?



Manufacturer vs producer: five scenarios that matter for wooden packaging

M When do you become the MANUFACTURER?

- | | | |
|---|---|--|
| 1 | Standard / unbranded pallet already in its final transport-packaging form | MANUFACTURER
PALLET MAKER |
| 2 | Pallet designed / manufactured under the customer's name or trademark | MANUFACTURER
BRAND OWNER / USER |
| 3 | Only components are supplied; the item becomes usable as packaging only after assembly | MANUFACTURER
ASSEMBLER |
| 4 | Importer / distributor puts it on market under its own name or modifies it in a compliance-relevant way | MANUFACTURER
IMPORTER / DISTRIBUTOR |
| 5 | Reusable packaging designed to a reuse-system operator's specifications and carries its trademark | MANUFACTURER
REUSE-SYSTEM OPERATOR |

DECISIVE-POWER TEST

Trademark appearance alone is not enough. The manufacturer is the party that determines the packaging design and specifications; contractual arrangements may require a case-by-case assessment.

P When do you become the PRODUCER?

- | | | |
|---|--|---|
| 1 | Empty unbranded pallet first supplied within the same Member State | PRODUCER
FIRST SUPPLIER / MAKER |
| 2 | Transport packaging bears the user / filler's name or trademark | PRODUCER
USER / FILLER |
| 3 | B2B shipment goes to another Member State and the recipient will further distribute it | PRODUCER
RECIPIENT
(DESTINATION MS) |
| 4 | Seller supplies directly to an end user in another Member State, including online | PRODUCER
CROSS-BORDER SELLER |
| 5 | Business unpacks / repacks imported packaged goods and is not the end user (where no earlier producer applies) | PRODUCER
UNPACKER / REPACKER |

FOR A STANDARD WOODEN PALLET

A finished, unbranded pallet is normally manufactured by the pallet maker. On its first domestic supply, that company may also be the producer.

**WHERE THE
OUTCOME
FOR WOOD IS
STILL OPEN?**



Four PPWR Files that will shape Wooden Packaging

The Regulation is settled. Many of the technical rules are not.



Reuse: calculation + minimum rotations

BIGGEST OPEN FILE

How pallets count – and how “rotation” is calculated – still open.

- Reuse-rate methodology is due by June 2027; minimum rotations by February 2027.
- Ramboll floated 15 rotations for wooden pallets. It is a study proposal – not EU law.



Packaging minimisation

ADVOCACY ACTIVE

“Minimum necessary” – not simply “use less”.

- Protection, handling, logistics, geometry and safety can justify the material used.
- FEFPEB is feeding real wooden-transport-packaging cases into the Commission/Eunomia work.



Design for Recycling

IN DEVELOPMENT

No final PPWR recyclability scorecard yet.

- Detailed DfR assessment waits for the secondary rules; criteria are due in 2028.
- For wood, watch how nails, adhesives, coatings and other components affect the grade.



Labelling

DELAYED

Most consumer sorting labels are not a pallet issue.

- Transport packaging is exempt from the harmonised material-composition label (except e-commerce).
- Reusable-packaging label / QR rules come later; the implementing act slipped beyond the original August timing.

FEFPEB: A RECOGNISED STAKEHOLDER



FEFPEB's PPWR advocacy since April

From monitoring the Regulation to actively shaping how it is implemented for wooden packaging

KEY SUCCESSES



FORMAL ACCESS

Official member of the Commission Expert Group discussing PPWR

A direct seat in the forum discussing PPWR implementation and technical follow-up.



STANDARDS INFLUENCE

Liaison status in CEN work on DfR and minimisation

FEFPEB can feed the wooden-packaging perspective into DfR and upcoming minimisation work.



RECOGNISED EXPERTISE

Selected by Commission consultants for technical input

FEFPEB has been identified as an interlocutor on reuse, minimisation and labelling.



SENIOR-LEVEL ACCESS

Met Commissioner Roswall's Cabinet on PPWR implementation

Direct exchange with Luis Planas Herrera on implementation, roles and the sector's practical concerns.



WOOD-SPECIFIC RECOGNITION

DG ENV acknowledged the sustainability case for wooden packaging

Written confirmation that sustainability aspects will be considered when defining DfR criteria.



POLICY OUTPUT

5+ coordinated positions and technical submissions

DfR, EPR, manufacturer / producer roles, SoCs, minimisation / ESR and minimum rotations.

HOW WE GOT THERE



TECHNICAL POSITIONS & ASKS



Put wood-specific arguments on paper

Clear asks on DfR, EPR, roles, minimisation, substances and rotations – not generic PPWR commentary.



Intervene before methodologies harden

Positions were timed to Commission, consultant and standards work so FEFPEB could shape the technical choices.



Keep the asks practical

Focus on reuse, repair, recyclability, design control, safety and proportionality for SMEs.



MEMBER EVIDENCE & COORDINATION



Use the PPWR Task Force as the engine

National associations, companies and specialist members stress-tested positions and trade-offs.



Mobilise sector evidence quickly

Statistics, repair / reuse data, technical examples and open-vs-closed system realities strengthened the case.



Turn different business models into one voice

Common positions were built without ignoring the legitimate differences inside the sector.



TARGETED ENGAGEMENT & FOLLOW-THROUGH



Go directly to the decision-makers

Cabinet, DG ENV, JRC / CEN, ECHA and Commission consultants were engaged on the files that matter most.



Follow up with written evidence

Meetings were reinforced by formal submissions, clarification requests and concrete sector examples.



Build support beyond FEFPEB

Customer, logistics, SME and wood-sector allies are being mapped to reinforce the sector's positions.

RESULT: FEFPEB has moved from reacting to PPWR to being recognised as a technical stakeholder that can shape its implementation.

The next implementation decisions that matter for FEFPEB

Practical messages now – and the dates that will determine the final rules.



Reuse

01

Build the evidence base

Repair, reconditioning and rotation data will matter.



Minimisation

02

Prove why the wood is necessary

Use cases and functional evidence strengthen the sector's case.



DfR

03

Watch the technical criteria closely

JRC/CEN recommendations could materially shape wood's recyclability grading.



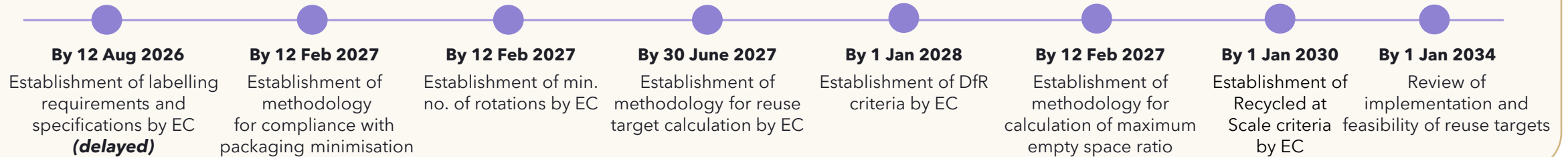
Labelling

04

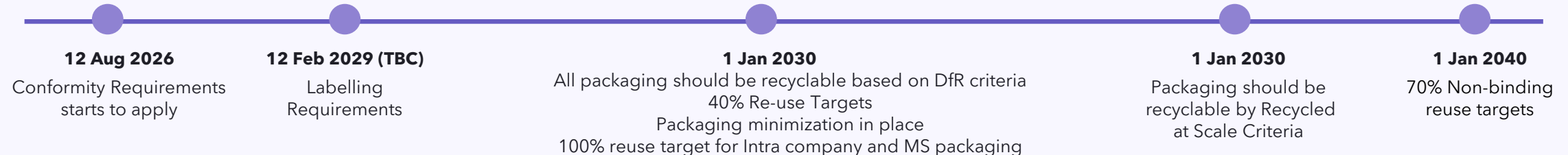
Engage before the rules crystallise

Reusability labelling remains an important implementation file.

PPWR SECONDARY LEGISLATION



PPWR COMPLIANCE MILESTONES



PPWR workplan: October–December 2026

Turn the positions already built into influence – and convert advocacy into practical member readiness

OCTOBER

Defend the reuse methodology
and build the coalition

NOVEMBER

Escalate key asks
and shape the technical work

DECEMBER

Prepare members
and lock in the 2027 plan

PRIORITY WORKSTREAMS

Workstream	Focus	Deliverables through year-end
Reuse & minimum rotations	Prevent a one-size-fits-all threshold	- Engage in Ramboll follow-up / stakeholder workshop and press the evidence gaps in the 15-rotation proposal Build the evidence pack on tracking limits Activate priority alliance partners and develop workable alternative approaches
Manufacturer / producer & EPR	Secure clarity, harmonisation and fair cost allocation	Follow the Commission FAQ and Czech / Member State initiatives on definitions and de minimis simplification - Refine practical wooden-packaging scenarios and continue pushing favourable eco-modulation Track national divergence and escalate where implementation risks fragment the Single Market
DfR & minimisation	Make future criteria work for wood	Stay close to JRC / CEN / Commission work on recyclability and prevention; engage CEN WG6 follow-up Feed real cases showing why protection, safety, logistics and geometry determine necessary material use Defend recognition of the existing wood recycling system and monitor nails, adhesives, coatings and components
SoCs, PFAS & labelling	Keep implementation evidence-based and proportionate	Follow ECHA work and protect the distinction between untreated natural wood and added treatments / substances - Pursue a risk-based PFAS approach and written clarity where substances are not intentionally added Finalise labelling recommendations and protect transport-packaging specificities
Senior outreach & member readiness	Turn advocacy into influence and business preparation	- Seek senior-level DG ENV / Commissioner engagement and targeted outreach to priority Member States, and MEPs - Run focused member data calls and turn recurring questions into practical implementation guidance December check-in: what changed, what FEFPEB achieved and what must be prioritised for 2027

WORKING TOGETHER THROUGH YEAR-END



TF PPWR meetings

Agree positions and trade-offs



Rapid alerts

Flag developments with business impact



Member evidence calls

Fill data gaps fast



Issue-specific drafting

Positions, letters and technical input



Targeted EU outreach

Commission, Member States and partners



December check-in

Assess progress and set 2027 priorities

BEYOND PPWR: THE NEXT POLICY HORIZON



Beyond PPWR: what else could shape FEFPEB?

A focused horizon scan – distinguish files that warrant active positioning from those that should stay on the radar.

KEY WATCHOUTS

Engage / shape now: *Direct or near-term implications for FEFPEB's circular business model, compliance burden or economics – with a live window to influence.*

Circular Economy Act

Proposal expected end-2026

WHY IT MATTERS

Could reshape EU rules for secondary materials, waste-to-resource flows and EPR – the policy architecture behind pallet reuse, repair and recycling.

WHY POTENTIAL ENGAGEMENT?

High strategic overlap with FEFPEB's circularity model; choices made here could reinforce or complicate how wooden pallets circulate across Europe.

Environmental Omnibus VIII

Co-legislative negotiations

WHY IT MATTERS

Targets simplification of environmental and circular-economy rules, including EPR-related obligations and reporting burdens.

WHY THIS TIER

Potential to change near-term administrative costs for SMEs and cross-border operators – including obligations linked back to PPWR implementation.

Circular VAT initiative

Consultation closes 4 Nov

WHY IT MATTERS

The Commission is testing VAT changes for circular business models, including the treatment of second-hand goods.

WHY THIS TIER

VAT treatment can materially affect the economics of repair, resale and reuse. FEFPEB has a timely opportunity to test pallet-specific impacts.

MONITOR

Track / intervene selectively: *Relevant, but exposure is more indirect or the final sector impact is still uncertain.*

European Product Act

Forthcoming package

WHY IT MATTERS

Will modernise horizontal product rules, conformity, market surveillance and digital product information.

WHY MONITOR

Possible knock-on effects for documentation and traceability, but direct exposure for wooden packaging is not yet clear.

Public Procurement Act

Commission proposal • 9 Sep

WHY IT MATTERS

Would give environmental, resilience and innovation criteria a stronger role in EU public purchasing.

WHY MONITOR

Could create demand-side opportunities for circular wood packaging, but impact is mainly indirect through customers and tenders.

What this means for FEFPEB now

The next phase is about converting access, evidence and member coordination into outcomes.

01

Protect the circular model

WHAT TO DEFEND

Repair, reuse, open-loop circulation, existing wood recycling infrastructure and proportionate implementation for FEFPEB members.

WHAT SUCCESS LOOKS LIKE

No one-size-fits-all reuse threshold; methodologies recognise real service life, repair and circularity.

02

Shape the implementation rules

WHERE TO STAY ACTIVE

Reuse and rotations, DfR, minimisation, EPR and roles, substances of concern and labelling.

WHAT SUCCESS LOOKS LIKE

Clear responsibilities and workable, wood-specific criteria that reward circularity without creating unnecessary burden.

03

Anticipate the next wave

WHAT TO WATCH

Circular Economy Act, Environmental Omnibus VIII, Circular VAT, European Product Act and Public Procurement Act.

WHAT SUCCESS LOOKS LIKE

FEFPEB engages early where new files could affect costs, market access, circular business models or customer demand.

BOTTOM LINE

Engage early. Bring evidence. Speak with one sector voice.

QUESTIONS?



Thank you

Nikhil Varghese
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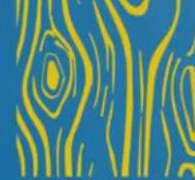
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73rd FEFPEB congress



FEPPEB Congress
SWEDEN 2024

Lunch

In the exhibition area – 12.00-13.15



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FEFPEB

– Activities, Priorities and Future Strategy of the Federation

Fons Ceelaert

*Secretary general
FEFPEB*





BUSINESS SESSION

73 RD FEFPEB CONGRESS

2 OCTOBER BÅSTAD - SWEDEN

FEFPEB ACTIVITIES / PRIORITIES AND FUTURE STRATEGY FEDERATION

FONS CEELAERT (NL)
SECRETARY GENERAL FEFPEB





FEFPEB IN TRANSITION

Since the Vienna congress 2025 in a complex and demanding process to decide upon a future organisation structure that will be instrumental to support the aims and ambitions of the EU wooden pallet and packaging industry.

The outcome of the process, as discussed and decided upon by the FEFPEB Policy & Technical Committee in their meeting prior to the congress on 30 September 2026 here in Bastad, is now to be shared with the FEFPEB community.

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MARKET DEVELOPMENTS WOODEN PALLET AND PACKAGING INDUSTRY

Changing market situation with ongoing consolidation

FEFPEB pro-active to reflect with involved parties on the impact for our future organisation structure, FEFPEB must remain unified and advocacy with one common voice, which is our proven strength.

17 September 2026: Press release new association [Wooden Pallets for Europa](#)

[To obtain information on reflections and actions regarding this initiative](#)

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ADVOCACY EU LEGISLATION

PPWR

Status presented by **our partner Nikhil Varghese (DGA – Brussels)**

Task Force PPWR (chairman Marcus Kirschner) with 25 FEFPEB participants, covering the WPM range

Priority list of actions defined for the next period, key topics now:

- Minimum rotations re-usable packaging / Comments on the Ramboll study
- Upcoming Circular Economy Act with reforming EPR
- FEFPEB dialogue with EC / commissioner J. Roswall on CEA and PPWR

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FEFPEB's statement regarding Ramboll Study on minimum rotations for reusable packaging

Brussels, 18 September 2026

FEFPEB, the European Federation of Wooden Pallet and Packaging Manufacturers, has reviewed the work prepared by Ramboll in the context of establishing minimum rotations for reusable packaging within the Packaging and Packaging Waste Regulation (PPWR).

FEFPEB has serious concerns about the approach applied to wooden pallets. The analysis does not adequately reflect how wooden pallet reuse operates in practice and therefore risks mischaracterizing its reuse potential. Considering these concerns, FEFPEB rejects the conclusions drawn by Ramboll and does not support the introduction of a mandatory minimum number of rotations for wooden pallets on the basis of the current assessment.

FEFPEB supports the objectives of the PPWR to strengthen packaging circularity and promote reuse. Wooden pallets already make a substantial contribution to these objectives through established systems of repeated use, repair, reconditioning and material recycling.

Setting a minimum number of rotations would have the significant effect of disturbing this well-established system, which currently ensures that wooden pallets are unquestionably recognized as a model of reuse in the packaging industry. To sum up, setting a minimum number of rotations would therefore reduce the reuse of wooden pallets, which runs counter to PPWR's objectives.

FEFPEB therefore strongly recommends that no mandatory minimum rotation requirement for wooden pallets be proposed on the basis of the current analysis. The evidence and methodology should first be reassessed in close consultation with the wooden pallet sector.

FEFPEB asks the Commission and Ramboll to consider the following fundamental concerns:

Insufficient consultation with the wooden pallet sector

FEFPEB considers it a significant weakness of the process that, as the representative of the European wooden pallet industry, we were not consulted during the development of the analysis.

This is particularly concerning given that the assessment appears to rely on only two data points. If so, such a limited dataset cannot, in FEFPEB's view, provide a sufficiently robust or representative evidence base to support the development of a mandatory minimum number of rotations at European level.

This raises fundamental questions about the representativeness of the evidence, the robustness of the methodology and whether the analysis can support a regulatory requirement with potentially significant consequences for the sector.

FEFPEB represents the wooden pallet industry across Europe and could have provided sector expertise, practical market knowledge and relevant industry data to inform the assessment. The absence of this input calls into question the completeness of the evidence base and, consequently, the weight that can reasonably be placed on the conclusions for wooden pallets.

Wooden pallets are already an established circular packaging solution

Individual tracking is generally not available for pallets circulating through open supply chains. A pallet may pass through numerous companies and users over its lifetime and be repaired and



returned to circulation multiple times. The absence of individual tracking is therefore not evidence of an absence of reuse; it is a characteristic of how this mature reuse system operates.

Across reporting markets, multiple-use pallets represented between 50% and 90% of reported manufactured volumes, including 90% in UK/Ireland, 75% in France and 70% in Belgium, Italy, Lithuania and Portugal.

More fundamentally, Wooden pallets already operate within a well-established system of reuse, repair and recycling. They are designed for repeated use and can remain in circulation for many years. They can be repaired and reconditioned several times and, at the end of their life, the wood can be recycled, extending the life of the material beyond the pallet.

Repair and reconditioning are therefore central to extending both pallet service life and material life.

FEFPEB market data indicates that approximately 153 million pallet repairs were reported across markets in 2023, compared with 147.2 million in 2021. These figures illustrate the substantial scale at which pallets are repaired and returned to use, notwithstanding less consistent reporting of repair data than production data.

An extensive infrastructure already exists across Europe for collection, sorting, repair, reconditioning and resale of used wooden pallets. Many businesses specialise in recovering pallets, repairing them and returning them to circulation.

Reuse is therefore not an emerging or theoretical feature of the sector; it is an integral part of its existing business model and circularity performance.

Any regulatory intervention should recognise and build on these established systems. A methodology that equates reuse primarily with individually counted rotations risks failing to capture the actual circular performance of wooden pallets and could create unintended barriers to their continued reuse.

Conclusion

FEFPEB urges Ramboll and the European Commission not to establish a mandatory minimum rotation requirement for wooden pallets on the basis of the current analysis. Before any such requirement is considered, the methodology and evidence base should be reassessed with meaningful input from the sector.

FEFPEB stands ready to support this work with sector expertise, practical market knowledge and relevant industry data, helping to ensure that future decisions are based on representative evidence base and accurately reflect the operational realities and existing circularity of the European wooden pallet sector.

ADVOCACY EU LEGISLATION

EUDR

In conjunction with **CEI Bois**, a Brussels-based EUDR cross-commodity coalition delivering input for the upcoming meeting of the **Deforestation Platform** on 5 October 2026.

These meetings provide useful opportunities to discuss the remaining EUDR implementation challenges in a practical and solution-oriented manner.

The FEFPEB Congress Sweden 2026 is generously supported by our esteemed sponsors



FEFPEB COMMUNICATION - MONTHLY FEFPEB NEWSLETTER



European Federation of Wooden pallet
and Packaging Manufacturers

FEFPEB Newsletter September 2026



1. European wooden pallet and packaging industry assembles for the 73rd FEFPEB congress, 30 September, 1 & 2 October 2026 / Båstad (Sweden)

"Wood packaging in a resilient Europe"

The registration is closed, expecting 190 participants at this excellent networking event. Swedish Wood and FEFPEB have prepared a very interesting, Swedish flavoured programme.

Click [here](#) for more information about the speakers at the business session.

2. PPWR Update

a. Minimum number rotations re-usable packaging / Ramboll study

Please click [here](#) for our statement regarding Ramboll's work on minimum rotations for reusable packaging under the PPWR, prepared and agreed by the Task Force PPWR.

It was sent to the *European Commission, Ramboll and other contacts in Brussels.*

We addressed our statement with the following introduction:

FEFPEB fully supports the PPWR's objectives to strengthen circularity and promote reuse. However, following our review of the work concerning wooden pallets, we have serious concerns that the current assessment does not adequately reflect how pallet reuse operates in practice or provide a sufficiently representative basis for establishing a mandatory minimum number of rotations.

For the reasons set out in the attached statement, FEFPEB does not support the introduction of a mandatory minimum rotation requirement for wooden pallets on the basis of the current assessment. In particular, we believe that the evidence base and methodology should be reassessed, with meaningful involvement of the wooden pallet sector, before any such requirement is considered.

Wooden pallets already operate within mature systems of repeated use, repair, reconditioning, and recycling across Europe. Their circular performance cannot always be captured through individual rotation counts, particularly in open supply chains where pallets circulate between numerous users over many years.

We would therefore welcome the opportunity to engage directly with the Commission and Ramboll as this work progresses. FEFPEB stands ready to provide sector expertise, practical market knowledge and relevant industry data to support an assessment that accurately reflects the operational realities of wooden pallet reuse.

We would be grateful if you could take the attached statement into consideration in the next stages of the work and we remain available for a discussion at your convenience.

b. EU commissioner Jessika Roswall on PPWR implementation, SME's and the Circular Economy Act

On Wednesday 18 september 2026, Members of the [European Parliament](#) debated the Packaging and Packaging Waste Regulation's impacts on small businesses selling across EU borders. [Jessika Roswall](#) attended this debate and the Commissioner for Environment, water resilience and a competitive circular economy gave her view.

She accepted the widespread concerns and described the process of developing the Regulation as a "careful negotiation" between "the need to transform our packaging systems on the one hand, and the capacity of businesses to adapt on the other." Nevertheless, she conceded that "we cannot ask small companies selling small quantities across several Member States to set up authorized representatives in each national market."

Roswall emphasized that SMEs are already permitted to source documentation from their packaging suppliers and are temporarily exempt from non-compliance fines, but accepted that "flexibilities on paper [are] not enough."

She continued: "We have established an expert group to give stakeholders a direct voice on implementation. We will improve practical guidance to help SMEs navigate the new rules, and we are intensifying the discussions with Member States. I also encourage national authorities to make full use of the flexibilities that are available.

"We should also remember that several of the major requirements will only apply from 2030. Companies will have time to redesign packaging, adapt product lines, establish re-use systems, and invest in new recycled technologies.

"And we don't stop there: as part of the **upcoming Circular Economy Act**, we will ensure that the extended producer responsibility will work better across Europe. Here we will propose clear simplification, harmonisation and digitalisation actions to support our SMEs and our Single Market."

EU commissioner Jessika Roswall on PPWR implementation, SME's and the Circular Economy Act

3. EUDR developments

a. Joint letter EUDR cross commodity coalition

To inform you that the Brussels-based EUDR cross-commodity coalition, in which CEI-Bois is actively involved, is currently preparing a new joint letter to the European Commission, following the statement of 29 May 2026 ([click here](#)), in which the partners of the coalition are mentioned.

This letter is input for the upcoming meeting of the Deforestation Platform on 5 October 2026. These meetings provide useful opportunities to discuss the remaining EUDR implementation challenges in a practical and solution-oriented manner.

October 2026.

The letter is expected to be published by Friday 26 September and you will receive further information.

b. EUDR: Information System update

To share the following information, which might be useful.

1.-Updated User Guide for Economic Operators (v3.0)

The updated User Guide for Economic Operators is **now published and available on CIRCABC** and on the Information [System website](#).

The document provides **clear instructions for users on how to create and manage Due Diligence Statements or Simplified Declarations** for the purpose of EUDR. It includes information on the system's functions and capabilities, as well as step-by-step procedures for: registering an account including the setup of the EU Login; assigning the appropriate role in the Information System; submitting and managing Due Diligence Statements and Simplified Declarations and their lifecycle; using the dashboard; searching submissions and applying the grouping function, where needed.

Translation into all official EU languages is in progress and will be made available in due course.

2.- New EUDR Information System Training dates for October

New dates for virtual training sessions on the EUDR Information System are now available on the [Green Forum Webpage](#).

Please note that there are **two types** of training session:

- Trainings on submitting **Due Diligence Statements**, primarily for **upstream operators** that must submit due diligence statements to comply with the EUDR;
- Training on submitting **Simplified Declarations**, primarily for **micro or small primary operators** (MSPOs).

3.-Other updates

Further information to understand the roles and responsibilities under EUDR, such as in the **scenario of re-import and the related conventional reference number** can be found on the EUDR [Green Forum Webpage](#).

COMPOSITE BLOCK FACT SHEET



What responsible buyers should ask for

- A clear technical specification covering dimensions, density, moisture and mechanical requirements.
- Evidence of nail-withdrawal and pallet-system performance for the intended application.
- Documented raw-material composition, recycled-content and chain-of-custody evidence, together with relevant PPWR and REACH information.
- Product-specific environmental evidence and appropriate end-of-life instructions.

Evidence base and further reading

- Regulation (EU) 2025/40 on packaging and packaging waste
- European Commission – 2026 PPWR guidance
- IPPC/FAQ – ISPM 15: Regulation of wood packaging material in international trade
- European Commission – Cascading use of wood
- EU LIFE project – composite pallet blocks using waste wood

Further industry sources are available from FEFPEB

NOTE: This fact sheet describes the composite-block category. Individual products differ in feedstock, binder, density, mechanical performance and environmental profile. Product-specific claims should be supported by technical documentation and independent evidence where appropriate.



Composite blocks: More value from every fibre

Resource-efficient, consistent components for reusable wooden pallets

**Use wood more efficiently.
Build pallets more consistently.
Keep valuable material in circulation.**



Contact FEFPEB

For more information about FEFPEB membership or sponsorship, please contact FEFPEB Secretary General, Fons Ceelaert at: info@fefpeb.eu

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Postbus 4076,
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5037 AA Tilburg,
The Netherlands

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www.fefpeb.eu



COMPOSITE BLOCK FACT SHEET



Composite pallet blocks

Also known as pressed-wood or wood-chip blocks – are engineered wood components made from selected wood particles combined with a bonding system and pressed under controlled heat and pressure. They are wood-based components, not plastic blocks, and are designed specifically for pallet production and palletised logistics.

A smarter use of wood resources

- Composite production can turn chips, sawdust, shavings and selected recovered wood into a functional pallet component.
- Makes material use of wood fractions that are too small or unsuitable for solid blocks.
- Can reduce demand for block-grade solid timber.
- Supports the cascading use of wood: material use, reuse and recycling before final energy recovery.

Reliable pallet connections – when correctly specified

- Properly specified composite blocks are engineered to provide reliable nail retention without the splitting that can occur in solid timber.
- Performance can be designed, measured and controlled through industrial quality assurance.
- Certified blocks should be tested against the requirements of the relevant pallet system or customer specification.
- Composite is a material category, not a guarantee: different recipes and densities do not perform identically.

More consistent dimensions

Fewer natural defects

Greater resource efficiency

Reliable nail-holding performance

Greater resource efficiency



Better suited to automated production

Support for reusable pallet systems

Suited to international trade

Consistency, fewer defects, efficient production

- Composite blocks are manufactured to defined dimensional and material parameters, reducing the variability associated with species, growth conditions, grain, knots, density and moisture.
- Accurate and repeatable dimensions.
- Reduced tendency to crack or split, with cleaner edges and a lower risk of splinters or protruding fibres.
- Stable pallet geometry and more predictable processing on automated pallet lines.
- Ready-to-use exact dimensions can reduce cutting, handling and production waste.
- Composite blocks enable faster, more consistent marking and improved readability compared with solid wood with both inkjet printing and branding plates.

A component for reusable pallet systems

- Composite blocks are widely used in pallets intended for repeated trips, repair and circulation. Their environmental value is greatest when they are part of a well-managed reusable pallet system.
- Supports long-life, repairable transport packaging.
- Keeps wood-based material in use across multiple logistics cycles.
- Can be recovered, recycled or otherwise managed at end of life in accordance with the block composition and applicable local rules.

Unlike a block cut from one piece of timber, a composite block can be produced from sawmill residues, wood-processing side streams and, where permitted and properly controlled, recovered wood. This allows the pallet sector to make productive use of smaller wood fractions and to reduce its dependence on block-grade solid timber.

International trade

ISPM 15 treats wood packaging made wholly from processed wood material created using glue, heat or pressure as sufficiently low risk to be exempt from the standard's treatment requirements. Composite pallet blocks generally fall within this processed-wood component category.

Note: this does not automatically exempt a complete pallet that also contains solid-wood boards. The finished pallet must still meet the phytosanitary requirements applicable to all its regulated components and the destination market.

Supporting the PPWR direction

The EU Packaging and Packaging Waste Regulation (PPWR) has applied from 12 August 2026. Composite blocks can support its objectives by enabling secondary wood use and by functioning within reusable, repairable wooden pallet systems.

Material choice alone does not prove PPWR compliance. Suppliers of packaging materials must provide packaging manufacturers with the information and documentation needed to demonstrate conformity, while the packaging manufacturer remains responsible for the conformity assessment and EU declaration of conformity.

Environmental value without greenwashing

The strongest environmental claim is not that composite is always greener. It is that composite blocks can use wood more efficiently and reduce demand for solid timber – when the feedstock and process are properly documented.

Environmental performance depends on factors including the raw-material mix, energy source, binder, transport distances, pallet service life and end-of-life route. Carbon-footprint figures should therefore be supported by a product-specific EPD or LCA rather than applied to the whole product category.

Composite blocks and solid-wood blocks: a practical comparison

ASPECT	COMPOSITE PALLET BLOCK	SOLID-WOOD BLOCK
Raw material	Wood particles; may include sawmill residues and controlled recovered wood	A sawn selection of solid timber
Use of wood residue	Can utilise smaller fractions and keep secondary wood in material use	Requires block-sized solid timber; offcuts may be generated during cutting
Dimensions and density	Engineered to defined parameters; high repeatability	Naturally variable by species, growth, knots and moisture
Natural defects	Reduced knots, splits and grain-related weak spots	Knots, cracks, splits and grain variation may occur
Nail retention	Can be engineered and tested; strongly dependent on density and recipe	Dependent on wood species, density, grain, moisture and defects
Moisture and biological risk	Controlled production moisture; high temperature processing reduces pest risk	Moisture varies; untreated material may require drying and phytosanitary treatment
Pallet production	Ready-to-use exact sizes; reduced sawing and trimming	Often requires cutting, sizing and sorting
ISPM 15	Generally treated as a processed-wood component; whole-pallet rules still apply	Raw solid wood is subject to applicable treatment and marking requirements
Circularity	Can incorporate residues or recovered wood and support reusable pallets	Renewable, reusable and recyclable when responsibly sourced and well managed
Environmental proof	Potential benefits must be verified for the actual products and supply chain	Likewise depends on forestry, drying, transport, service life and end of life

FEFPEB PRESS ACTIVITY



- Post-spring meeting release: *FEFPEB plans future response to regulatory challenges* - June 2026
- Post-congress release: *European pallet and packaging industry highlights compliance collaboration* - October 2025
- Sent to timber and supply chain media in FEFPEB countries, Europe, rest of world



FEFPEB PRESS COVERAGE 2026 EXAMPLES



News |

European timber pallet manufacturers prepare to boost lobbying power

Stephen Powney June 16, 2025

Share

The 72nd FEFPEB Congress will be held from 20 September to 2 October 2026 in Gäddede, Sweden

The European Federation of Wooden Pallet and Packaging Manufacturers (FEFPEB) has announced plans to strengthen the organisation's response to growing political, environmental and regulatory challenges facing the sector.

The federation is working on a strategy to help the industry better tackle increasing legislative obligations and consolidate FEFPEB's position as the recognised voice of the sector in Europe and beyond.

FEFPEB's future structure and direction was among the items discussed at FEFPEB's spring meeting in Porto, which was hosted by the Portuguese Association of Wood and Furniture Industries (AIMMP) earlier this year.

"As the regulatory and political landscape becomes increasingly complex, it is essential that FEFPEB builds on the past eighty years of work to remain a strong, united European organisation, and evolves to best represent our members' businesses into the future," said FEFPEB Secretary General Fons Ceelbert.

"FEFPEB has represented the industry on issues that include international phytosanitary regulations and ISPM 15, circular economy policy, packaging legislation, and sustainability requirements. Through our Packaging from Nature campaign, we have also worked to raise awareness of the important contribution that wooden pallets and packaging make to the European economy and the environment."

REUSABLE PACKAGING NEWS

FEFPEB recently held its 2025 annual congress in Vienna.

Vienna, October 2025 – Collaboration across the European wood pallet sector value chain will be essential for navigating the new wave of sustainability regulation. That was the central message from the 2025 annual congress of the European Federation of Wooden Pallet and Packaging Manufacturers (FEFPEB), where delegates reviewed tightening compliance obligations facing the pallet and packaging sector.

Representatives from across Europe met on October 23 and 24 at the headquarters of the Austrian Wood Industries. The agenda focused on the European Deforestation Regulation (EUDR), the Packaging and Packaging Waste Regulation (PPWR), Extended Producer Responsibility (EPR) frameworks, and the EU Circular Economy Act, as well as the operational tools needed to support industry adaptation.

"Cooperation with other wood-based industries and related institutions is vital to FEFPEB's work," said Secretary

Home - News

By PH Staff | 22 June 2025

FEFPEB plans response to regulatory challenges

The European Federation of Wooden Pallet and Packaging Manufacturers (FEFPEB) has announced plans to strengthen the organisation's response to growing political, environmental and regulatory challenges facing the sector.

In consultation with its European wooden pallet and packaging organisation members, the federation is working on a strategy to help the industry better tackle increasing legislative obligations.

FEFPEB's future structure and direction was among the items discussed at FEFPEB's spring meeting in Porto, which was hosted by the Portuguese Association of Wood and Furniture Industries (AIMMP) at the InterContinental Porto – Palácio das Cardosas during the spring.

FEFPEB secretary General Fons Ceelbert said: "Since FEFPEB was founded in 1946, it has played a vital role in representing wooden pallet and packaging manufacturers across Europe."

European Timber Pallet Manufacturers Prepare to Boost Lobbying Power

Editor WoodBusinessPortal.com team - research, 2025 - July 14

European timber pallet and wooden packaging manufacturers are preparing to strengthen their lobbying power as the sector faces a more complex regulatory and market environment. For professionals in the wood industry, the development is important because pallets are a critical part of logistics, trade, industrial packaging, construction supply chains, retail distribution and export operations.

The European Federation of Wooden Pallet and Packaging Manufacturers (FEFPEB) has announced plans to strengthen its response to growing political, environmental and regulatory challenges affecting the sector. The organisation is working with member associations across Europe to develop a strategy that can consolidate its position as the recognised voice of the wooden pallet and packaging industry in Europe and beyond.

The most complex of a time when timber packaging producers are facing several overlapping pressures. These include the EU Packaging and Packaging Waste Regulation, circular economy policy, Extended Producer Responsibility rules, sustainability compliance, international phytosanitary regulations such as ISPM 15, and the EU Deforestation Regulation. For pallet manufacturers, these rules can directly influence production standards, documentation, waste systems, recycling obligations, raw material sourcing and export procedures.

Wooden pallets are often seen as simple logistics products, but they play a strategic role in European and global supply chains. They support the movement of goods across manufacturing, retail, food, construction materials, machinery, chemicals and e-commerce. Any change in packaging regulation, timber availability, pallet timber prices or compliance rules can affect not only pallet producers, but also sawmills, timber traders, logistics providers and industrial buyers.

FEFPEB's stronger lobbying position is therefore likely to focus on ensuring that policymakers understand the specific characteristics of wooden pallets and timber packaging. Unlike many single-use packaging products, wooden pallets are frequently reused, reused and recycled. This circular model is already embedded in many European pallet pools and industrial supply chains. The sector will likely seek recognition for wood's renewable nature, the reusability of pallets, carbon storage benefits and the importance of practical compliance requirements.

The timing is significant. The EU Packaging and Packaging Waste Regulation entered into force in 2025 and will generally apply from August 2026. It introduces requirements covering packaging design, recyclability, reuse, waste prevention and producer responsibility. At the same time, EUDR issued due diligence and sustainability rules increase the need for reusable wood supply chains. These developments make industry representation more important for companies that need clarity, predictability and workable implementation rules.

For wood industry professionals, the key message is that timber packaging is moving higher on the European policy agenda. Pallet manufacturers, sawmills and wood suppliers should monitor legislative developments, pallet timber price index, raw material quality, import and export flows, certification requirements and market trends. Better data will be essential for companies that want to plan purchasing, pricing, production capacity and long-term investment.

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Home » Europe Woodworking News » FEFPEB develops long-term strategy to support Europe's wooden packaging sector

FEFPEB develops long-term strategy to support Europe's wooden packaging sector

July 8, 2026 By Rajeksha Patra

The European Federation of Wooden Pallet and Packaging Manufacturers (FEFPEB) is preparing a new strategic direction to strengthen its role in representing Europe's wooden pallet and packaging sector.

The initiative comes as businesses across the industry face an increasingly complex regulatory, environmental and political landscape.

Working closely with its member organisations across Europe, the federation is developing a framework that aims to improve industry representation while helping businesses respond more effectively to evolving legislative requirements.

PROFESSIONAL WOODWORKING TODAY

FEFPEB charts future strategy to meet regulatory challenges

The European Federation of Wooden Pallet and Packaging Manufacturers (FEFPEB) has announced plans to strengthen the organisation's response to growing political, environmental and regulatory challenges facing the sector.

In consultation with its member organisations from across the European wooden pallet and packaging sector, the federation is working on a strategy to help the industry better tackle increasing legislative obligations and consolidate FEFPEB's position as the recognised voice of the sector in Europe and beyond.

FEFPEB's future structure and direction were among the topics discussed at FEFPEB's spring meeting in Porto, which was hosted by the Portuguese Association of Wood and Furniture Industries (AIMMP) at the InterContinental Porto – Palácio das Cardosas.

FEFPEB Secretary General Fons Ceelbert said: "Since FEFPEB was founded in 1946, it has played a vital role in representing wooden pallet and packaging manufacturers across Europe. Through FEFPEB's committees and working groups, it has worked to ensure policymakers understand our business when developing legislation to coordinate our industry's response to developments in international trade and to communicate the wide-ranging environmental and economic benefits of wooden pallets and packaging."

FEFPEB has represented the industry on issues including international phytosanitary regulations and ISPM 15, circular economy policy, packaging legislation and sustainability requirements. Through our Packaging from Nature campaign, we have also worked to raise awareness of the important contribution that wooden pallets and packaging make to the European economy and the environment."

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to Advance AI-Powered Warehouse Robotics

Hydr delivers first hydrogen fuel cell-powered truck

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FEFPEB plans future response to regulatory challenges

Jun 20, 2025

The European Federation of Wooden Pallet and Packaging Manufacturers (FEFPEB) has announced plans to strengthen the organisation's response to growing political, environmental and regulatory challenges facing the sector.

In consultation with its European wooden pallet and packaging organisation members, the federation is working on a strategy to help the industry better tackle increasing legislative obligations and consolidate FEFPEB's position as the recognised voice of the sector in Europe and beyond.

FEFPEB's future structure and direction was among the items discussed at FEFPEB's spring meeting in Porto, which was hosted by the Portuguese Association of Wood and Furniture Industries (AIMMP) at the InterContinental Porto – Palácio das Cardosas during the spring.

News

European pallet manufacturers highlight collaboration between wood-based industries

The European Federation of Wooden Pallet and Packaging Manufacturers (FEFPEB) has highlighted the importance of collaboration between wood-based industries and associated organisations to support its membership in compliance with evolving regulatory requirements.

Stephen Powney November 24, 2025

Share

The event was opened by FEFPEB President Rob van Hoesel, alongside Dieter Lechner of the Association of Austrian Wood Industries (Fachverband der Holzindustrie Österreichs) and FEFPEB Secretary General Fons Ceelbert, and featured presentations and discussions about the implications of tightening sustainability compliance obligations facing the industry. This included developments in major legislation including European Deforestation Regulation (EUDR), Extended Producer Responsibility (EPR), Packaging and Packaging Waste Regulation (PPWR), and the EU Circular Economy Act.

The European Federation of Wooden Pallet and Packaging Manufacturers (FEFPEB) has highlighted the importance of collaboration between wood-based industries and associated organisations to support its membership in compliance with evolving regulatory requirements.

It was one of the key messages from the 72nd annual FEFPEB Congress – held in Vienna on October 23 and 24 2025 – for representatives from across Europe's wooden pallet and packaging sector.

The event was opened by FEFPEB President Rob van Hoesel, alongside Dieter Lechner of the Association of Austrian Wood Industries (Fachverband der Holzindustrie Österreichs) and FEFPEB Secretary General Fons Ceelbert, and featured presentations and discussions about the implications of tightening sustainability compliance obligations facing the industry. This included developments in major legislation including European Deforestation Regulation (EUDR), Extended Producer Responsibility (EPR), Packaging and Packaging Waste Regulation (PPWR), and the EU Circular Economy Act.

FEFPEB LINKEDIN ACTIVITY



Posts (examples shown):

Regular posts on European pallet and packaging business

Additional posts on FEFPEB Congress and press activity

1,826 followers

Last 365 days (to September 22, 2026):

1,249 reactions (all likes, comments, shares)

31 comments

Average engagement rate: 11.5% (> +3.5% is considered strong)

188 new followers



FEFPEB BROCHURE UPDATE



www.fefpeb.eu

**Supporting the European
pallet and packaging industry
since 1946**



www.fefpeb.eu

Eight decades of leadership...

The Fédération Européenne des Fabricants de Palettes et Emballages en Bois (FEFPEB) - the European Federation of Wooden Pallet and Packaging Manufacturers - has been the heart of the European wooden pallet and packaging industry since 1946.

FEFPEB represents its membership in Europe and globally.

- Promotes and protects the role of wooden pallets, lightweight packaging and industrial packaging with lobbying and communications.
- Works with the EU to shape legislation including ISPM15 and regulations such as PPWR and EUDR.
- Supports innovation and research in the supply chain.
- Facilitates industry networking and education through its newsletters, PR, and annual membership meetings.



A global network

The businesses in FEFPEB's network manufacture well over half a billion wooden pallets, and repair approximately a quarter of a billion more every year for reuse.

FEFPEB also includes European pallet pools (ICHEP, EPAL, IPP Logipal, LPR, and PRS), who together own, repair, and trade more than a billion timber pallets around the world.

FEFPEB is the leading association championing Europe's major organisations for wooden pallet and packaging, representing their shared interests on the

international stage. It provides regular networking and social opportunities, brings together the most influential people in our business, and helps shape the policies that impact on our sector.

The wood pallet and packaging industry is naturally based on principles of renewability. This is increasingly recognised

by policymakers as they work to develop truly circular economies for the future. Promoting our credentials in this area is another of FEFPEB's core missions.

Rob van Hoessel
FEFPEB President





FEFPEB FORMAL MATTERS

Introduction Board of Officers (President – Treasurer / vice President 1 and 2, SG)

Part of the executive committee, for day-to-day business and preparing meetings and decisions full executive committee

Composition FEFPEB executive committee

Rob van Hoesel (NL), President
Renaud Cornu (F), vice-President 1
Mark Agatz (G), vice-President 2
Eduardo Marquez (SP), Honorary Treasurer
Mrs Paola Riva (I), section industrial packaging
Salvador Cervera Beamut (SP), section LWP
Roeland Moens (B), section pallet pools
John Dye (UK), pallets
Fons Ceelaert (NL), secretary general

The FEFPEB Congress Sweden 2026 is generously supported by our esteemed sponsors





OTHER FORMAL MATTERS

- FEFPEB membership meetings 2027
- Membership developments 2025 – 2026
- Working group activities
- FEFPEB President and SG meet their members

The FEFPEB Congress Sweden 2026 is generously supported by our esteemed sponsors





**THANK YOU FOR YOUR ATTENTION AND
PARTICIPATION AT THE CONGRESS**

**THANKS TO SWEDISH WOOD
MATHIAS, EDWARD, ANKI, THERESE
FOR THE EXCELLENT AND FRIENDLY CO-OPERATION!**

- END -





FEFPEB Congress

SWEDEN 2026

»Wood packaging in a resilient Europe«

30 September, 1, 2 October 2026
73rd FEFPEB congress

Forest certification systems PEFC and FSC dialogue



Christina Lundgren
*CEO and
National Secretary
PEFC Sweden*



Jan Ihre
*Market
Development Manager
FSC Sweden*



FEFPEB Congress

SWEDEN 2026

»Wood packaging in a resilient Europe«

30 September, 1, 2 October 2026
73rd FEFPEB congress



FEPFEB Congress
SWEDEN 2024

Coffee break

In the exhibition area – 14.30-15.00

**Market developments
/ timber availability
Forecasting, valuations
and raw material availability
in key global markets**

Christian Nielsen

*Market Analyst
Swedish Wood and the
Swedish Forest Industries Federation*



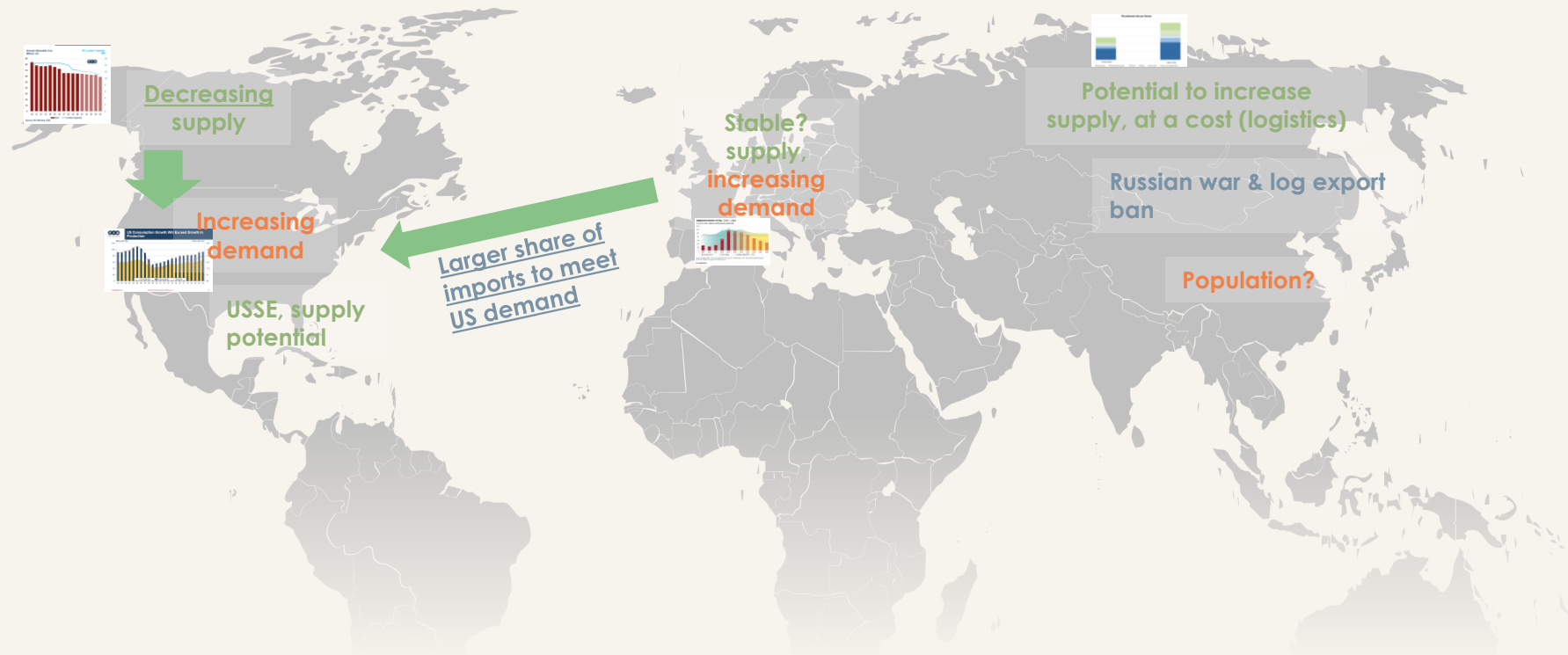
Sawnwood market

Christian Nielsen

October 2026

World market sawn softwood – medium term

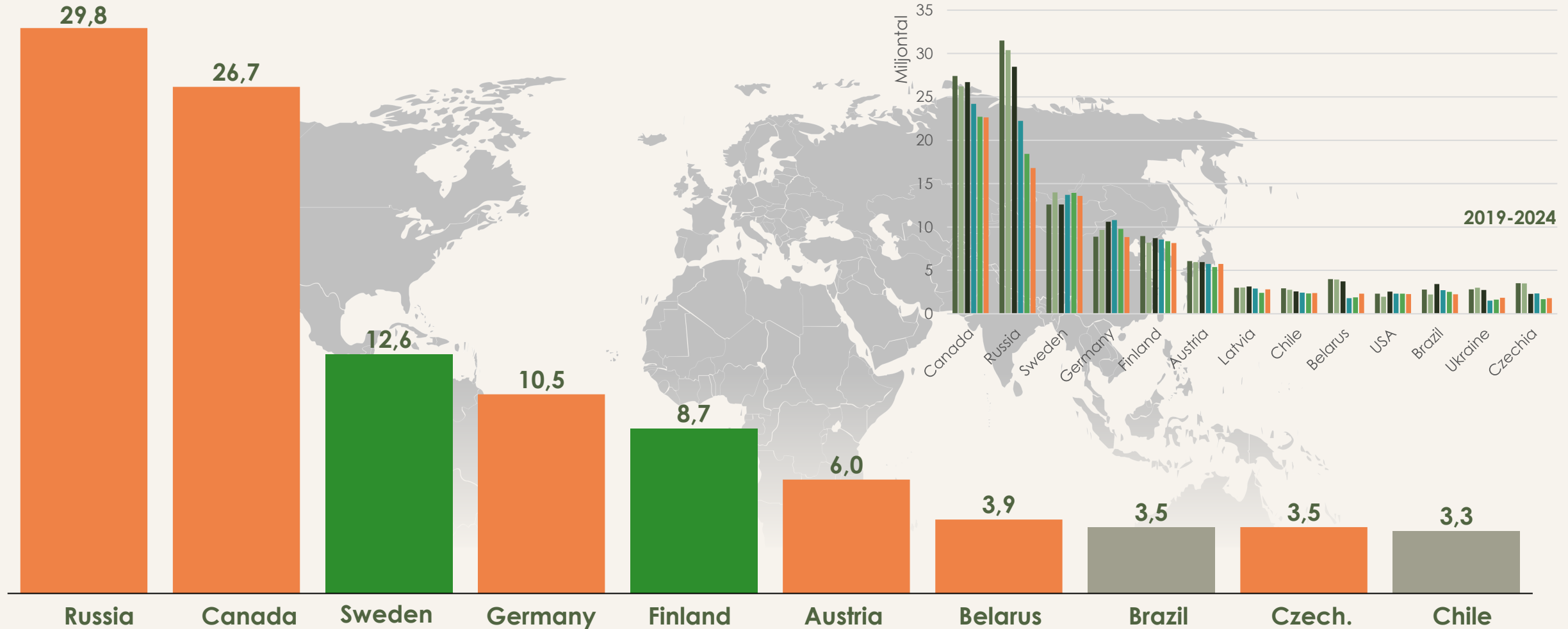
- Continuously decreasing supply from Canada (BC), due to bark beetle infestation 15 years ago
- Increasing demand from the US due to construction demand
- Increasing demand in Europe, with *stable supply*
- Supply potential in US south East and Russia



Increased trade flow from Europe in to america, as Canadian supply will be unable to meet demand in the US. Few other regions will have the potential to increase their supply substantially, other than the US South East (lesser quality), and Russia (high cost).

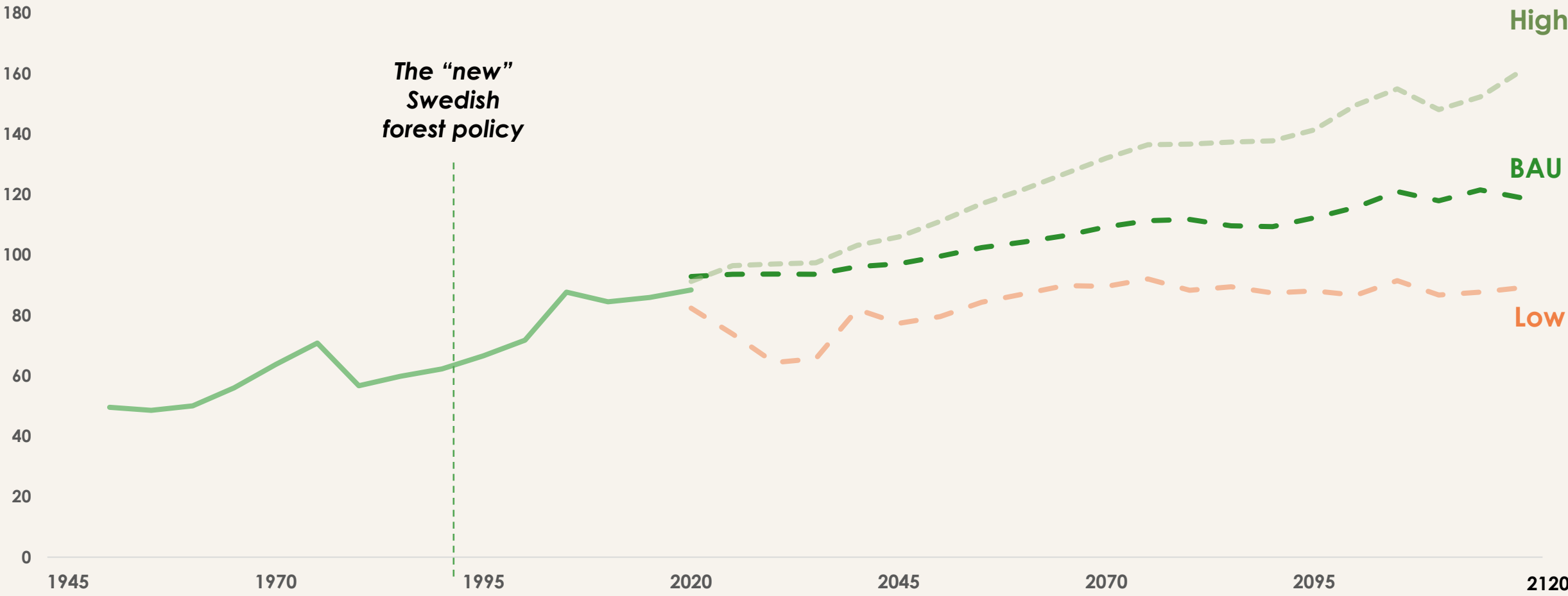
Reliance on the north

Global sawnwood exports
2021



A choice for a sustainable future

Harvesting scenarios from the Swedish Forest Agency

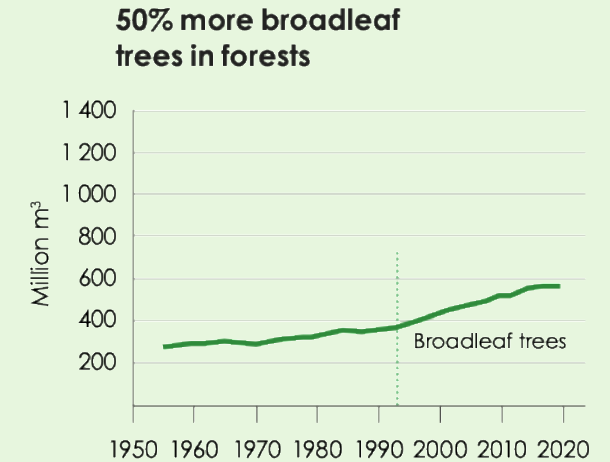
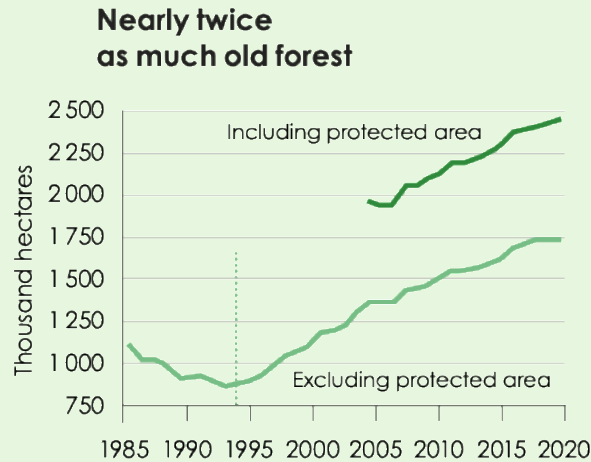
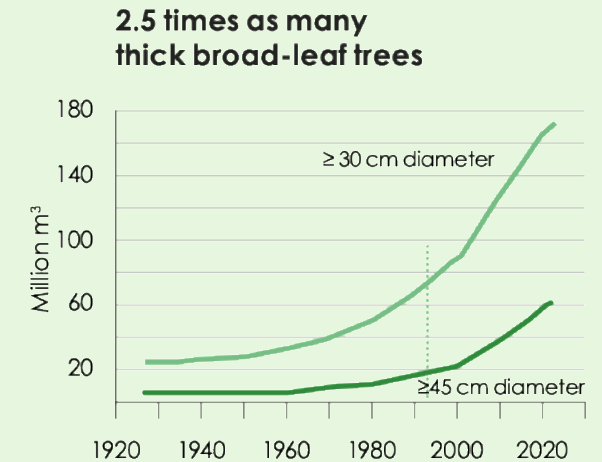
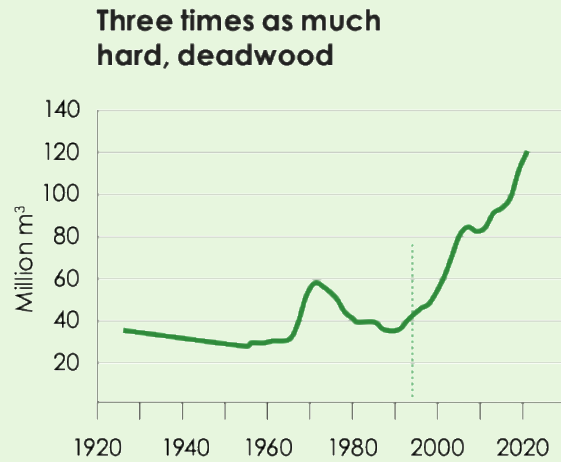


Source: Skogsstyrelsen, SKA-22

Swedish forests becoming more diverse

One way to measure biodiversity is to examine the conditions that allow various species to thrive. Dead trees – often referred to as deadwood – are essential for many species, which is why they are both created and left to lie in the forest after harvesting. The number of old trees and old forests has increased, and forests are more diverse, which promotes biodiversity.

The diagrams show how several trajectories change direction in the 1990s with the introduction of a new forest policy, with equal weight given to production and the environment. Sweden also introduced a new Forestry Act in 1994.



Vertical dotted line marks when the Forestry Act came into force.

Holland 1900



If there's less resources?

- SDR – Small diameter roundwood
- Blue stained wood
- Spruce vs Pine for construction?
- Revolutionary technology, yield +1%
- Construction efficiency – the whole value chain
- More Engineered Wood Products
- More volatility, and changed trade patterns

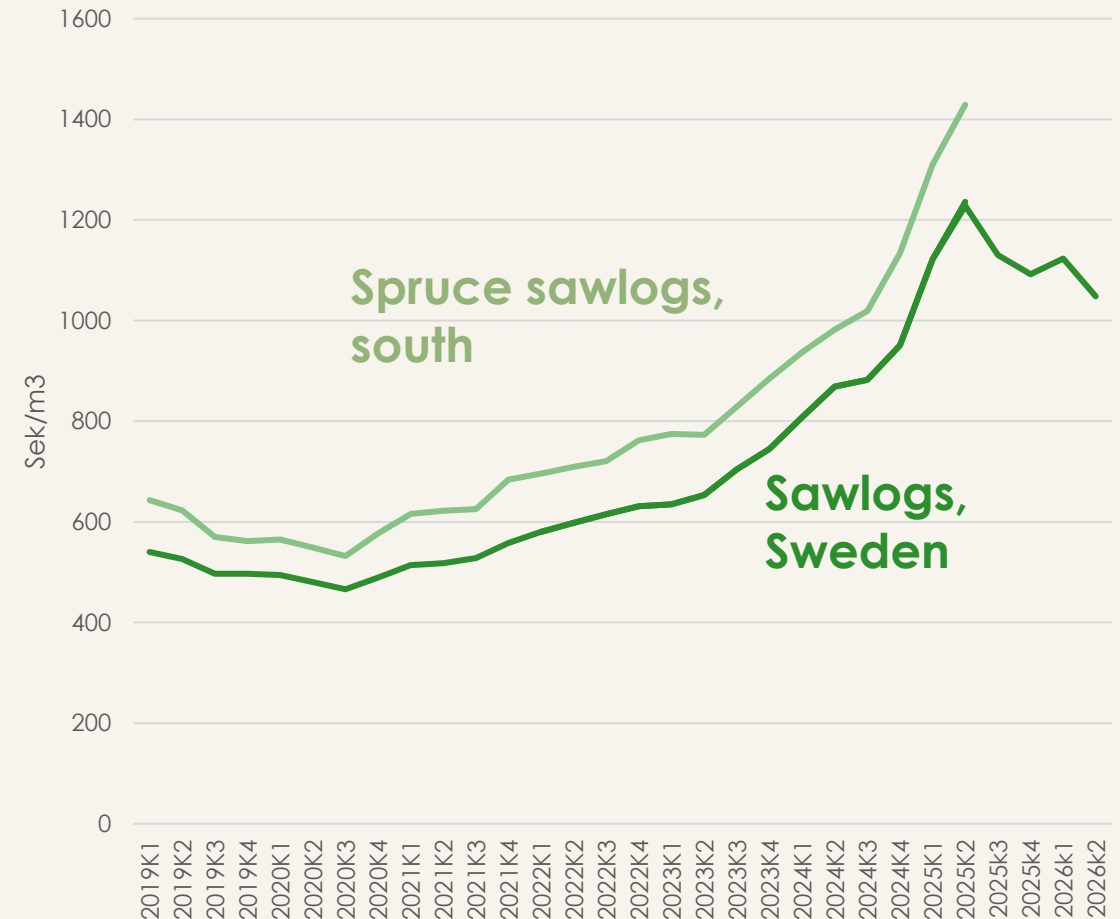


Sweden

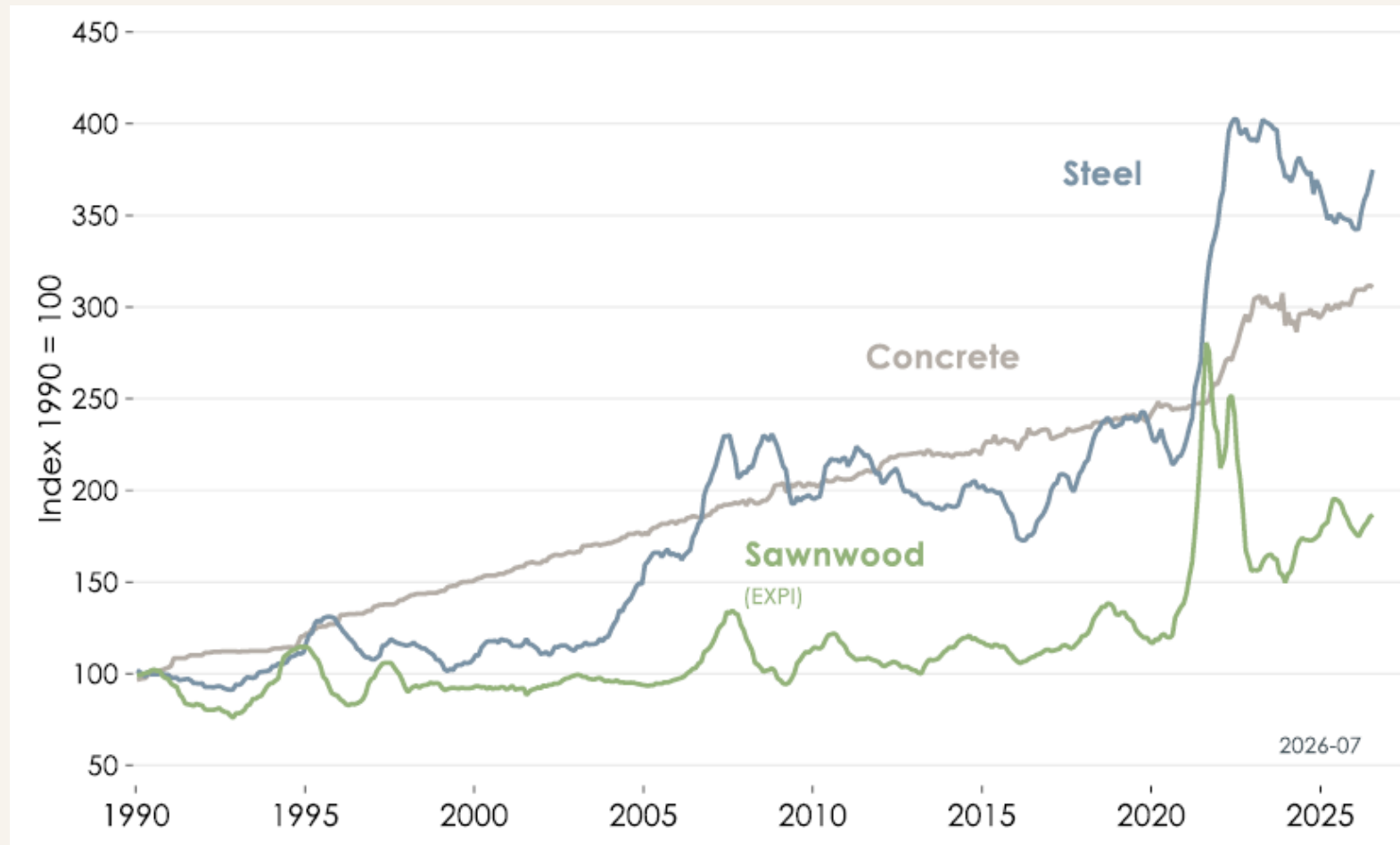
Market situation

- Current situation ~~very~~ *still* difficult
- Costs have increased significantly over time in the region, despite a slowing market
- While product prices have not been able to keep up
- Domestic markets stagnating
- Curtailments + large investments = 1800 redundancies
- Many are losing money, and many have been losing hope
- *Has the tone shifted?*

Swedish sawlog prices

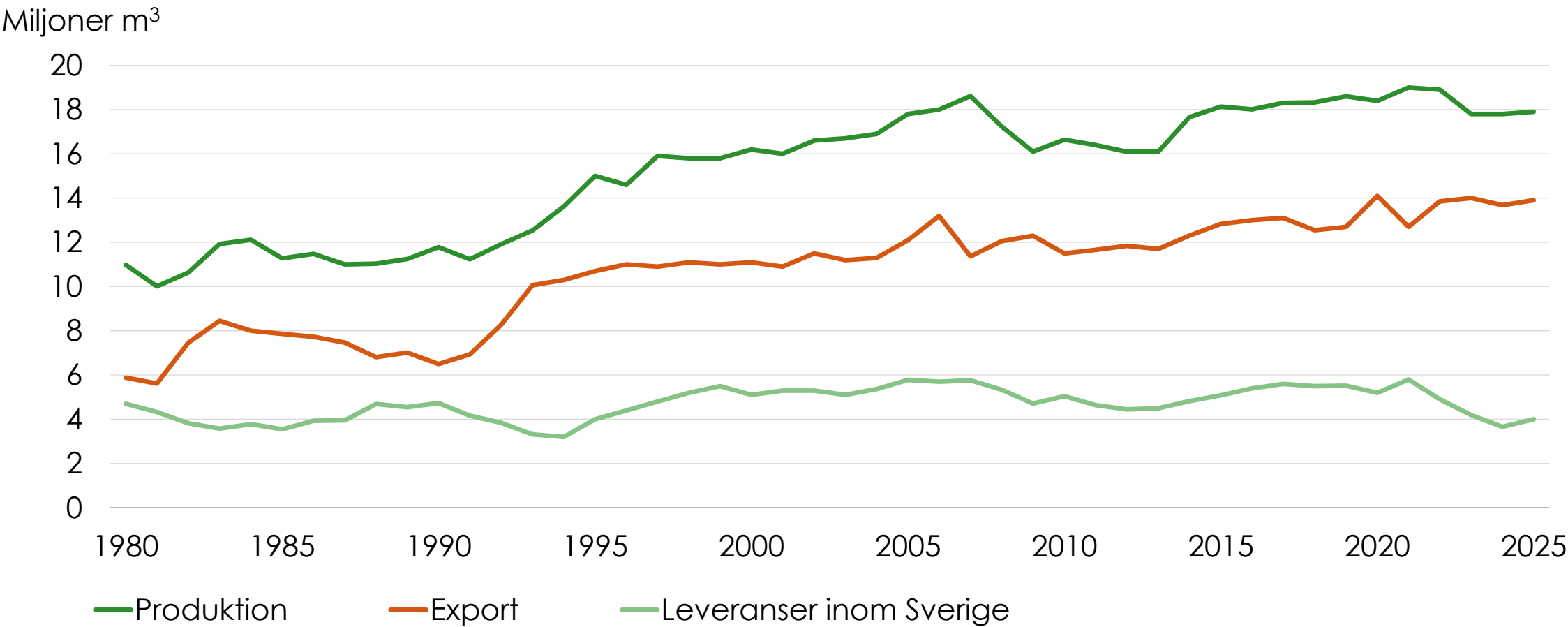


Swedish Price Indices – Building materials



Production and exports 1981-2025

Sawn softwood

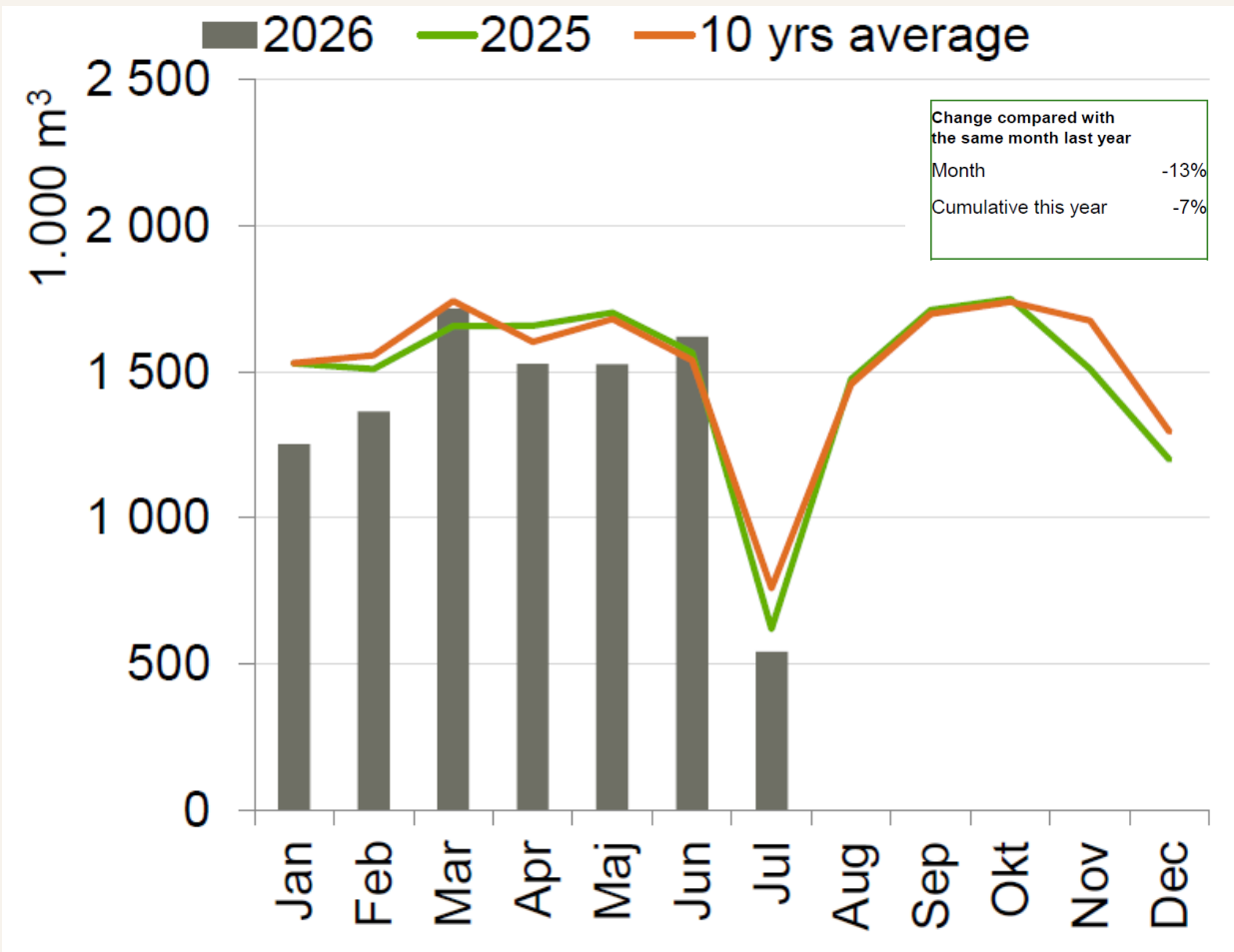


Produktion 2024: 17,8 miljoner m³ (2023: 17,8)

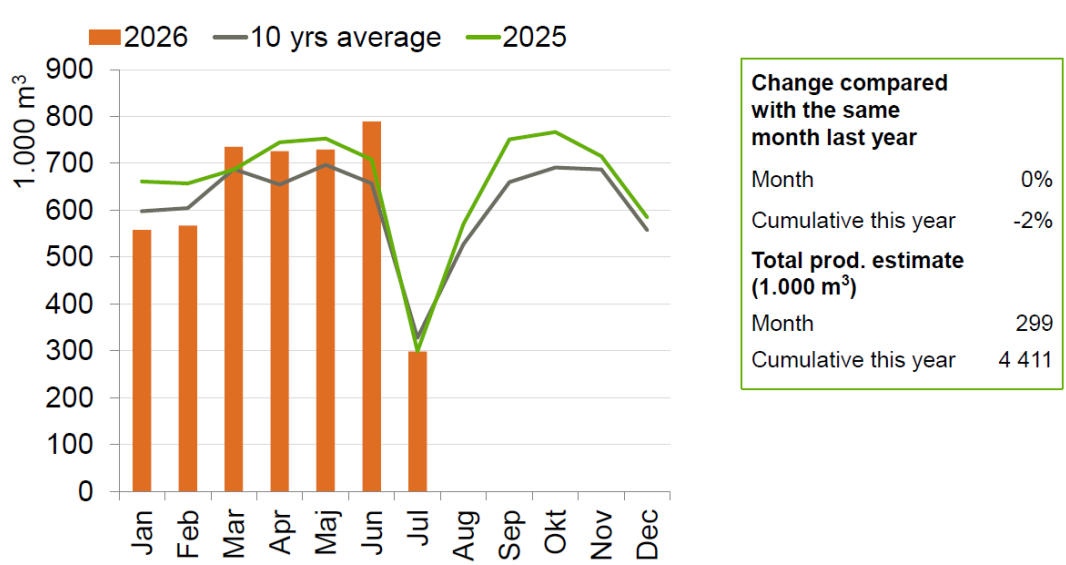
Export 2024: 13,68 miljoner m³ (2023: 14,0)

Källa: SCB, Skogsindustrierna

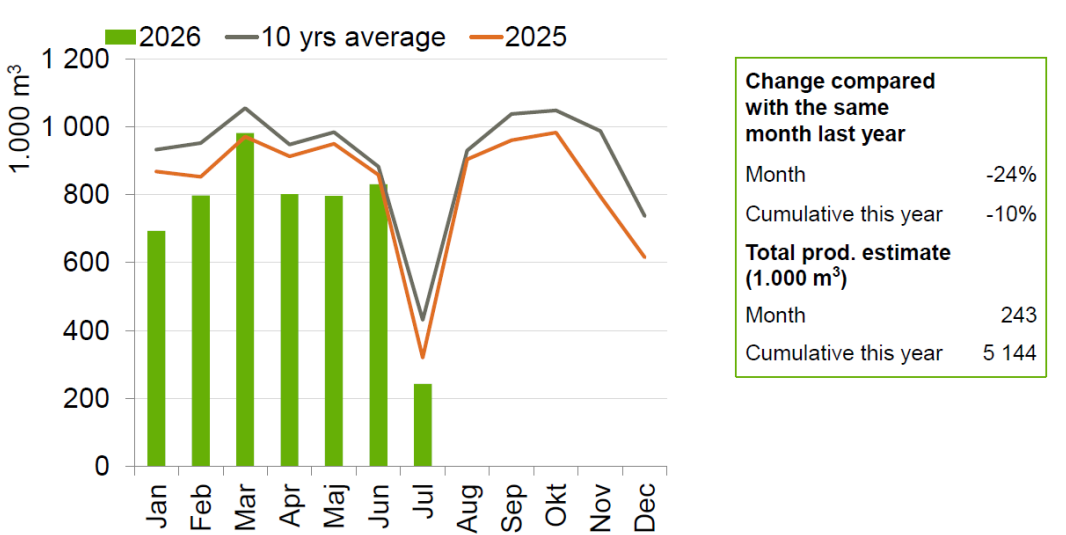
Swedish sawnwood production



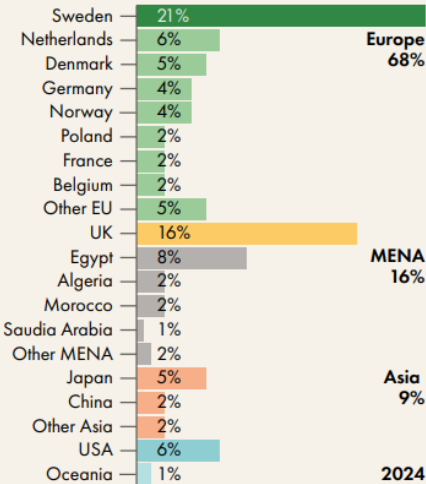
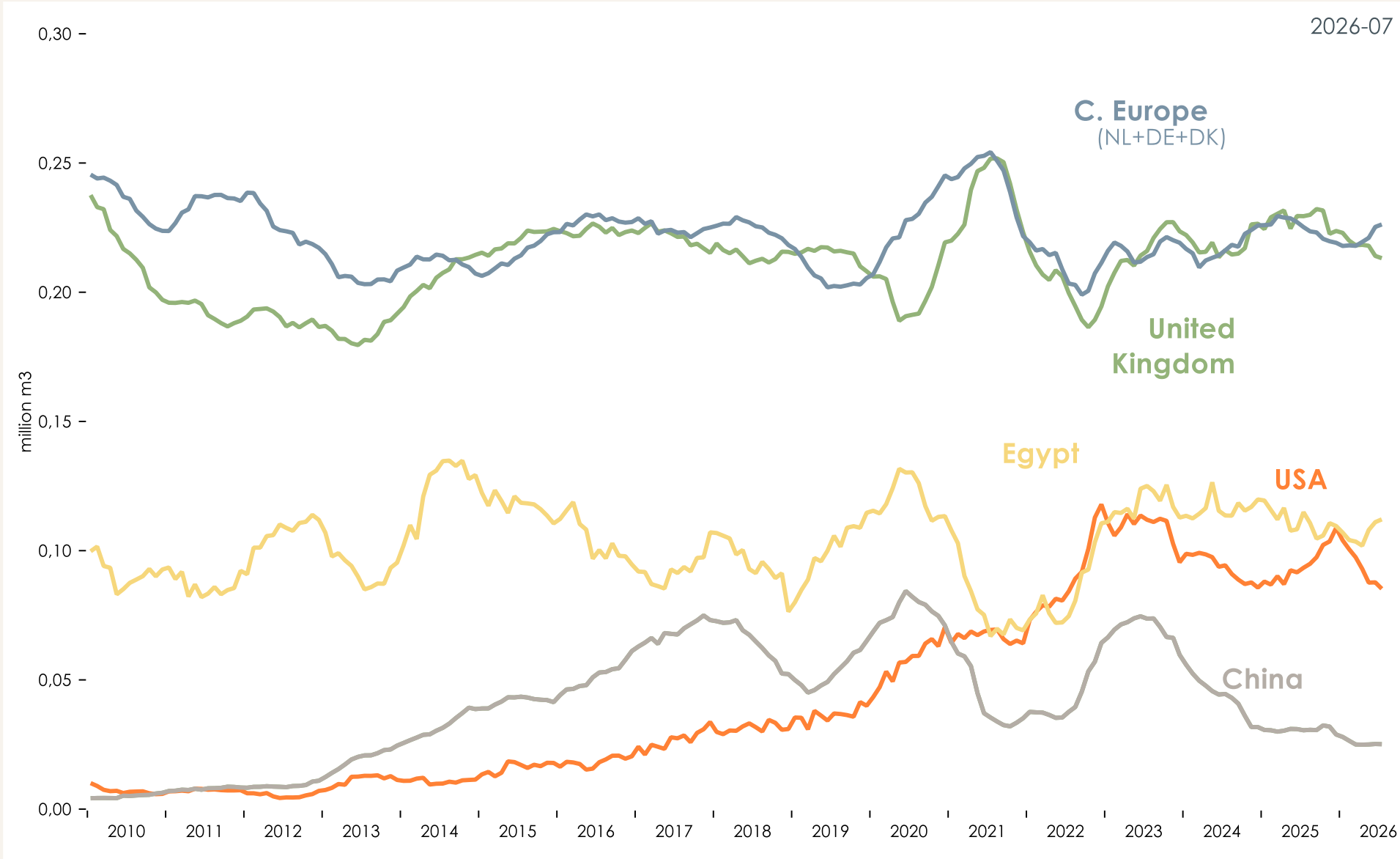
Swedish Redwood Production



Swedish Whitewood Production



Swedish sawnwood exports, selected countries



Source: Svandata och Skogsindustrierna

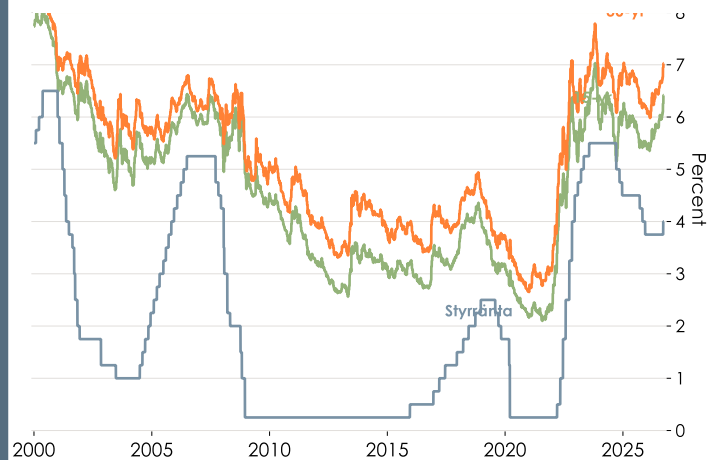
The World



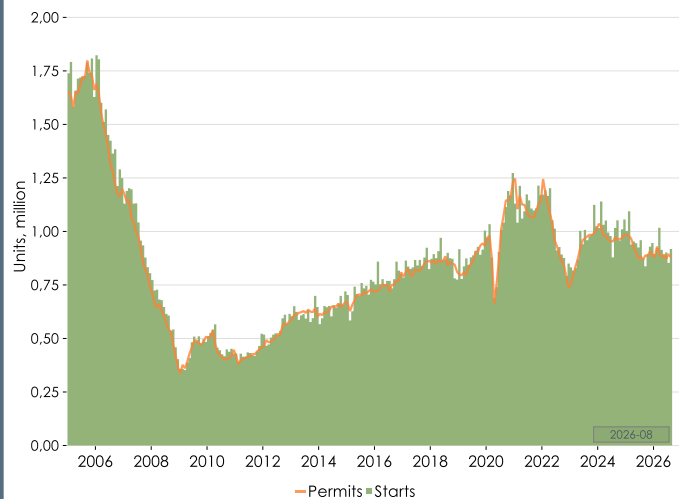
USA

Demand

US – interest rates



Construction activity

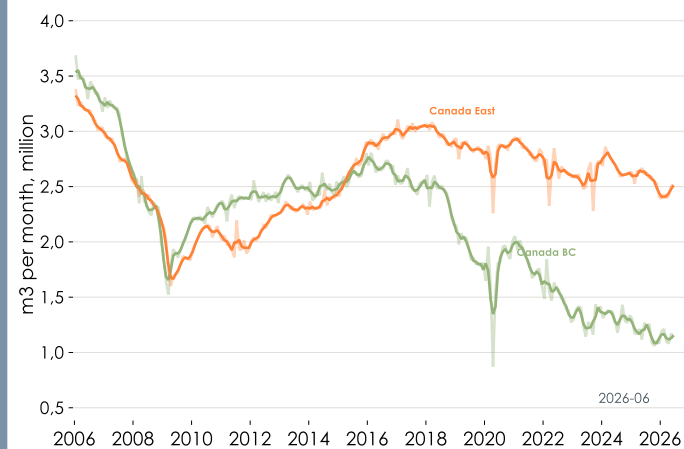


Källa: Macrobond

Local supply

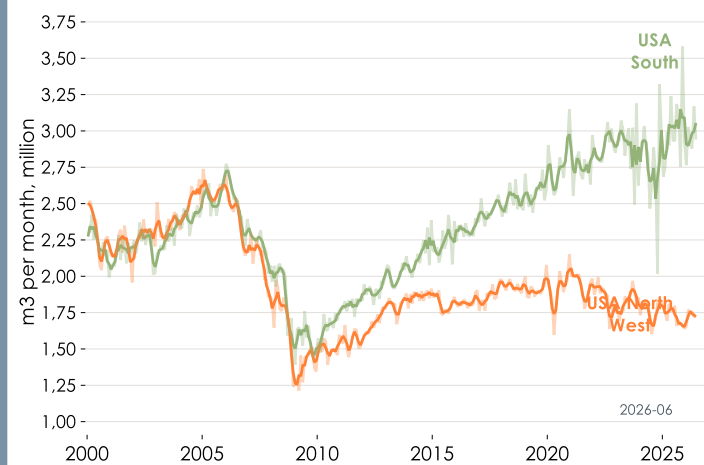
Canada. Softwood Production per region

SA and 3m MAV.



USA. Softwood Production per region.

SA and 3m MAV

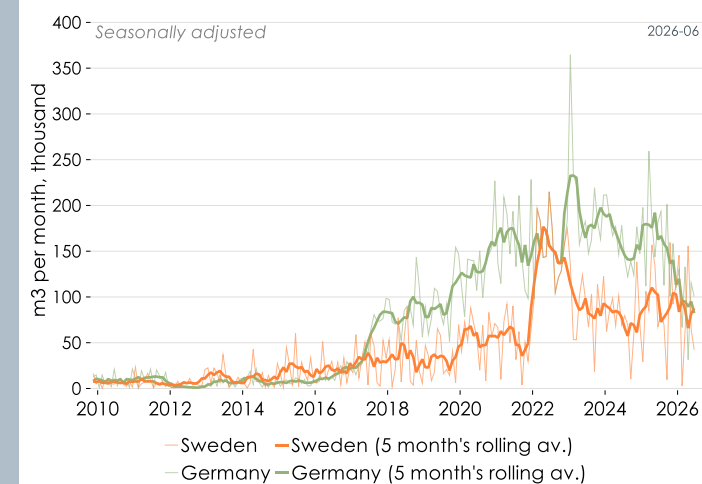


2026-10-07

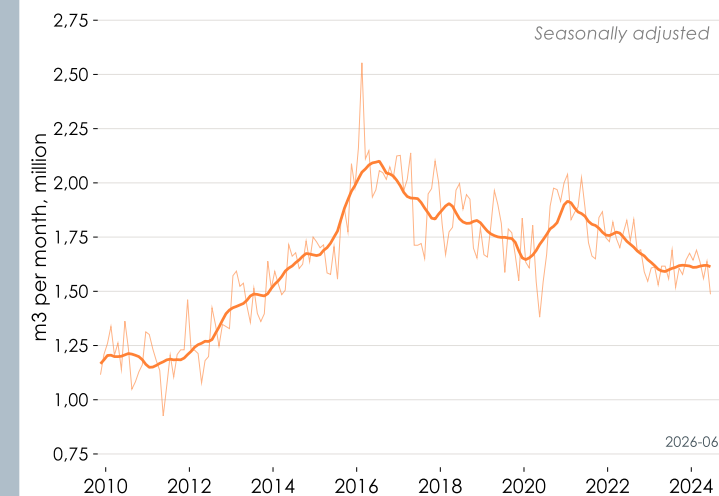
Källa: WWPA

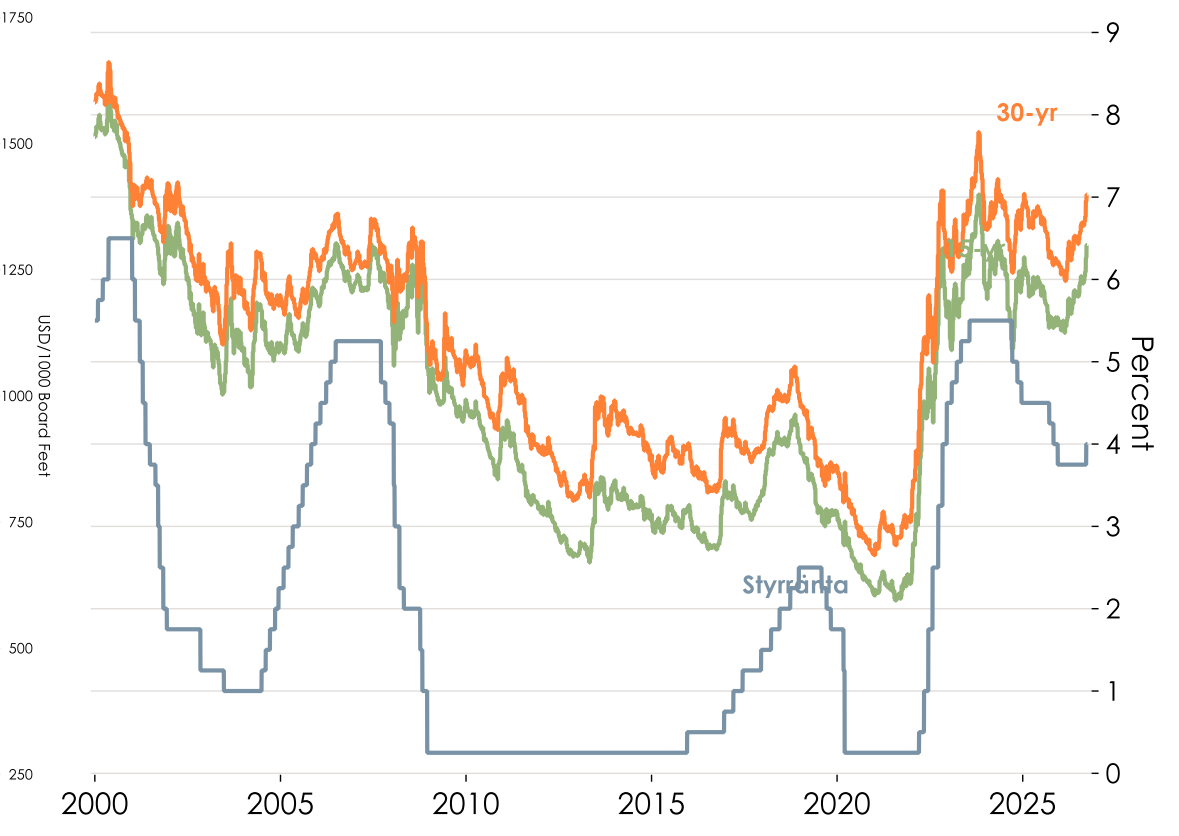
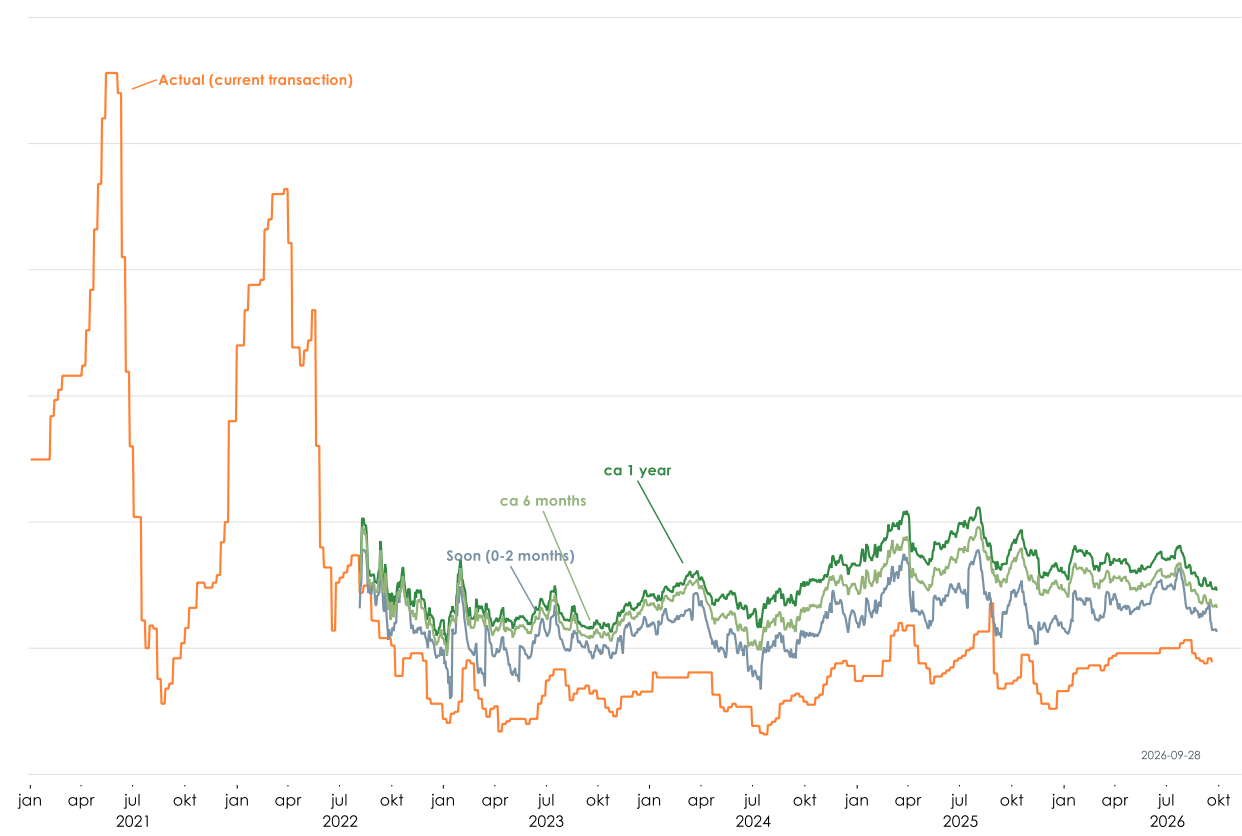
Imports

United States. Imports of softwood, selected countries



United States. Imports of softwood from Canada.





US-tariffs!?!? -old news

- **IEEPA**

- Struck down by court 20 February
- Refunds on their way to the *importer on record*.

- **Turnberry agreement, EU-US trade deal**

- EU votes/negotiations, 19 may possibly moved forward
- Trump: *"immediately jump to much higher levels if the agreement is not completed by July 4."*

- **Section 232: wood product specific**

- Sawn wood 10%
- Furniture and cabinets (25% september 2025), furniture to increase to 30% and kitchen cabinets 50% (jan 1 2026) postponed to 2027 jan 1.

- **Section 122:** Temporary tariffs from 24 February to 24 July (150 days)

- Court has found them unlawful, administration expected to appeal, only those who brought charges (?)
- Does not apply to sawnwood (superseded by 232 – tariffs)
- Tariffs will continue to be collected to 24th July
- Exemption roughly same as IEEPA (pulp exempted)
- ~~10~~ => 15%

- **Section 301:** will substitute 122 when runs out, investigation concludes 24 July.

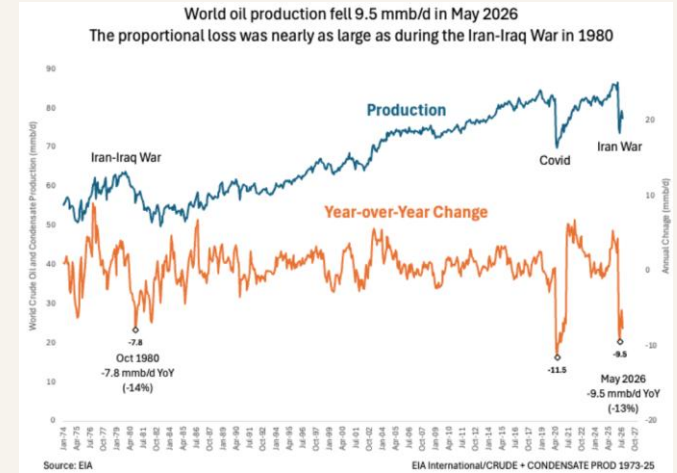
- Structural excess capacity - are there state support to increase capacity?
- Forced Labor enforcement act – are there laws and due diligence to validate there are no imports of forced labor products? *Report published in June, difficult to interpret, one part of report claims EU will implement required laws in 2027, and other part of the report claims EU is non-compliant. For sawnwood 232 remains in effect.*



Every day, a new 52-week high for European natural gas.

Europeans now pay 8.6 (!) times more for natural gas than Americans.

And the bidding war with Asia to fill storage sites for next winter has n...

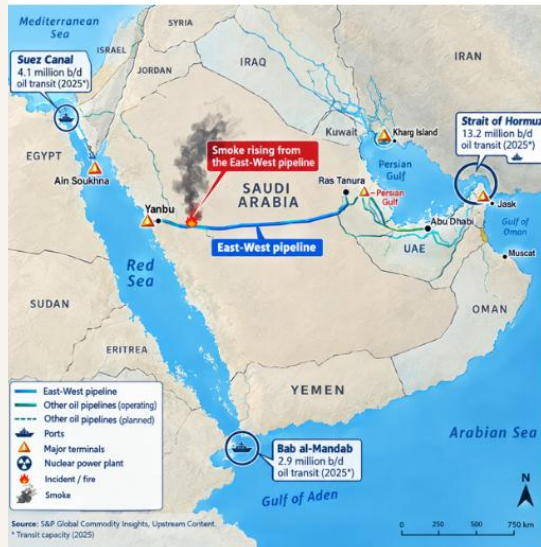


2x4caster @2x4caster · Sep 4
Loggers in trouble.

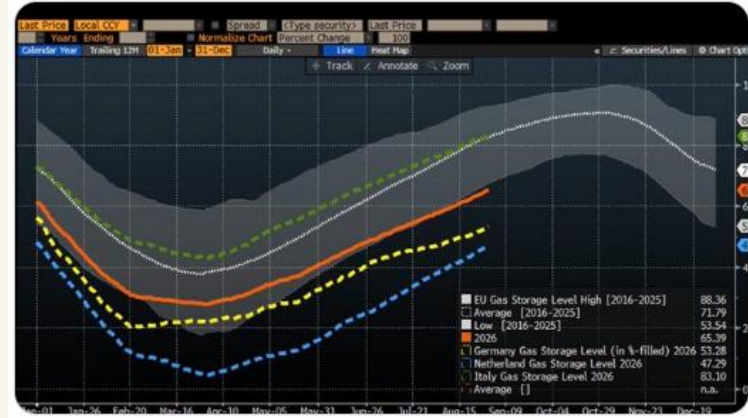
Patrick De Haan @GasBuddyGuy · Sep 3
BREAKING: according to GasBuddy data, the live U.S. national average price of diesel has set a new record: \$5.820/gal, surpassing the previous daily \$5.819/gal all-time high that occurred June 17, 2022. (9/3/26 3:25pm ET)

Francesco Sassi @Frank_Stones · Sep 11
Smoke is rising from the East-West pipeline, the main oil pipeline available to Saudi Arabia to avoid the Strait of Hormuz.

The Houthis are stepping up a massive offensive against Riyadh.
...



Gaslager Europa

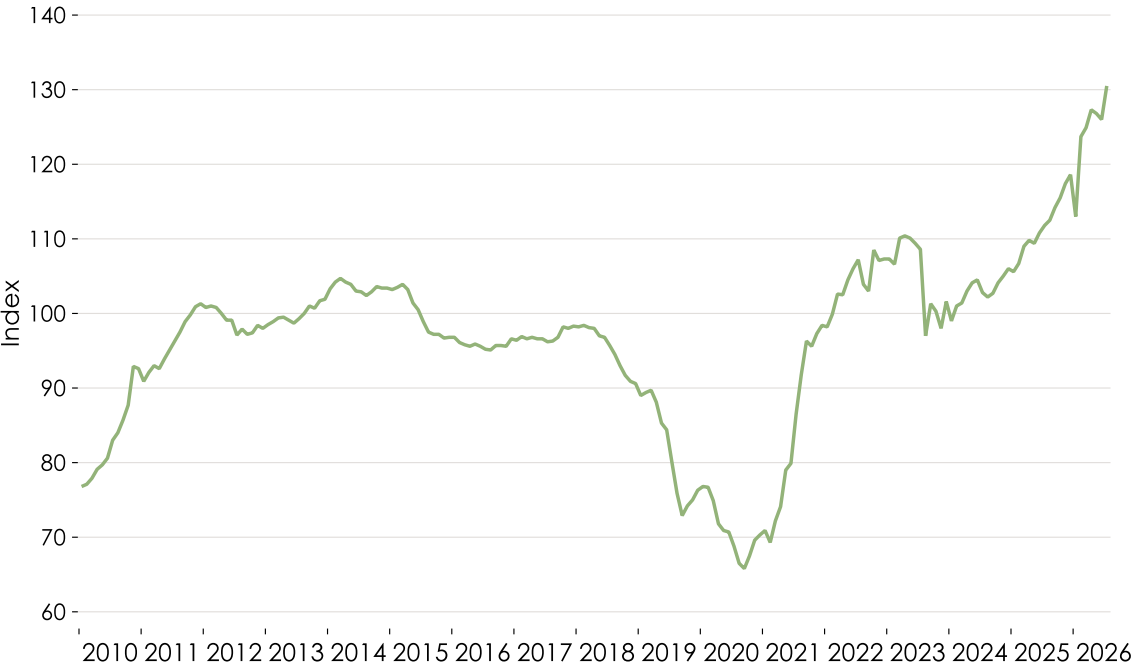


Javier Blas @JavierBlas · Sep 10
Qatar is in discussions to buy LNG from US suppliers under long-term agreements as the Iran war has crippled its ability to supply its own customers.

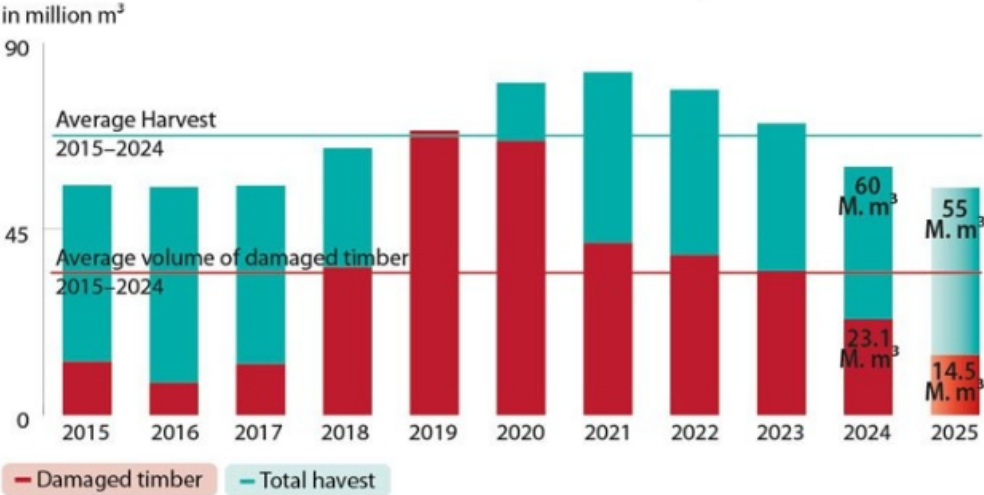
Qatar used to supply ~20% of the world's LNG, but its shipments have all but stopped since the Iran war started in late Feb.

Germany

Germany - Spruce logs



TIMBER HARVESTING/DAMAGED TIMBER GERMANY | 2015–2025

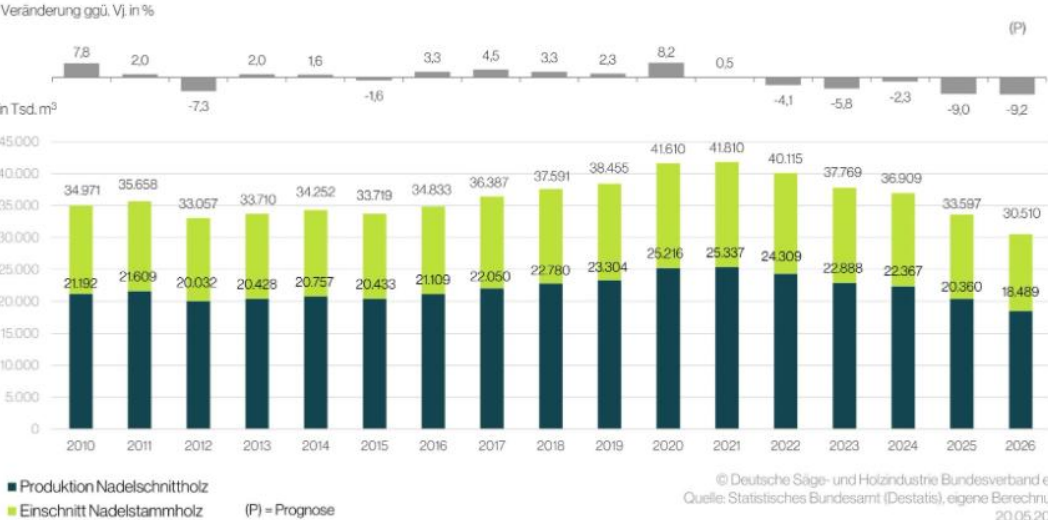


Source: Federal Statistical Office, BMEL; 2015–2024 final figures, 2025 Holzkurier-Estimate | © Holzkurier 2025

The Federal Ministry of Agriculture also expects around 14.5 million cubic meters of damaged timber in its 2nd forecast on forest damage in 2025. This corresponds to 26% of the planned total felling.

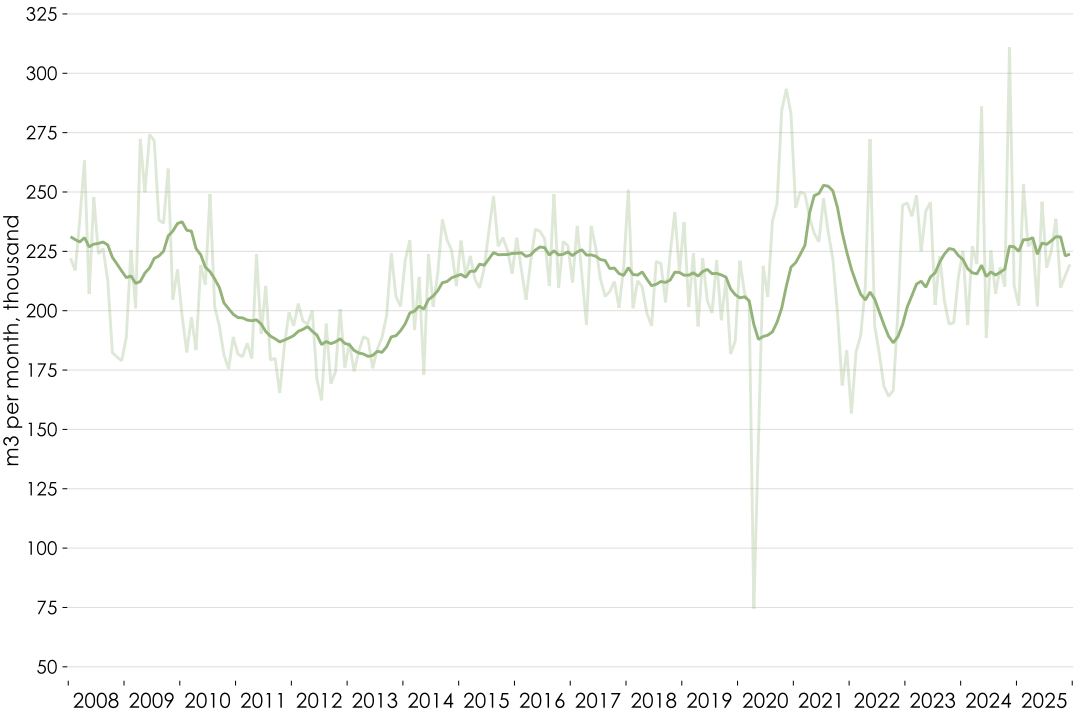
©
BMEL, Holzkurier

Produktion Nadelstammholz & Einschnitt Nadelstammholz Jahre und Änderungsrate / Prognose 2026



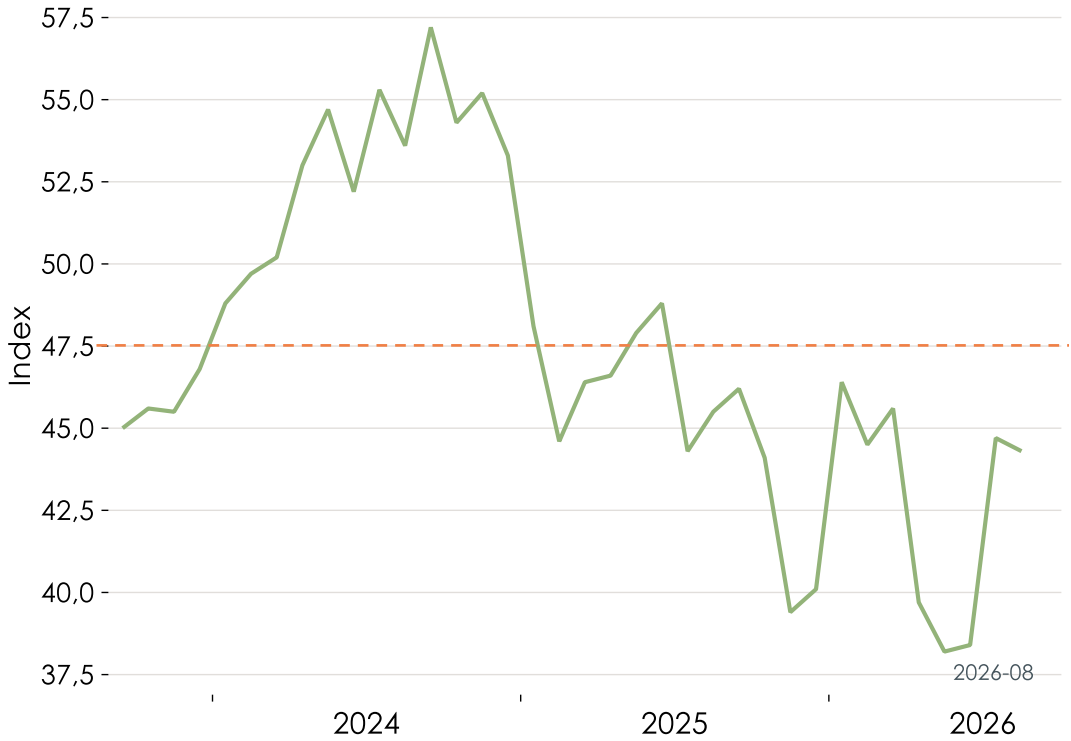
© Deutsche Säge- und Holzindustrie Bundesverband e.V.
Quelle: Statistisches Bundesamt (Destatis), eigene Berechnung
20.05.2026

Swedish exports to the UK



Source: Macrobond and Svandata

Building activity



Source: Macrobond and PMI

Outlook & summary





Skogs
Industrierna



FEFPEB Congress

SWEDEN 2026

»Wood packaging in a resilient Europe«

30 September, 1, 2 October 2026
73rd FEFPEB congress

Closing remarks

Rob van Hoesel

President FEFPEB





FEFPEB Congress

SWEDEN 2026

»Wood packaging in a resilient Europe«

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Dinner at Norrviken gardens

Busses leaves at 17.30

