



Two Sides

Euro-Graph General Assembly

29th June 2022



The Two Sides Campaign, Funding Changes

- It is proposed that Euro-Graph central funding will cease. It will be, in future, the decision of individual mills whether to support the Two Sides campaign
- Two Sides will now administratively maintain relationships with individual Euro-Graph supporting members

The Two Sides Campaign. The Role

- Since 2008, using Two Sides materials we have told the sustainable story of our products and engaged anti-print and paper messaging when it arises
- Globally over 600 stakeholders/members – including European associations e.g. Intergraf, PostEurop, Eugropa, FEPE – and regional country associations for print, post, ink, machinery.... **help amplify our message**
- Sustainability has never been a higher priority within corporate culture. Society's focus on paper and Paper-based packaging will remain strong and our industry's performance, and Two Sides role in spreading that message, remains vital to communicate

The Two Sides Campaign - Unique

- We work closely with industry associations to align sustainable communications
- Greenwash. Tackles corporates and NGOs where misinformation can grow if left unchallenged
- The 'Love Paper' campaign builds an emotional attachment with consumers for Paper and Paper-based Packaging
- With materials and fact sheets we provide our industry with credible facts and information concerning the sustainability of our products
- We talk directly to consumers with growing social media activity

12 million consumers reached in 2022. 25 million planned for 2023

Greenwash is increasing across Europe

PRIVATKUNDEN GESCHÄFTSKUNDEN ÜBER GENERALI KARRIERE SERVICE & KONTAKT

SELF SERVICE SCHADEN MELDEN KONTAKT APPS RATGEBER JOURNAL

RVICE & KONTAKT / SELF SERVICE

Tschüss Brief, hello Zukunft

Ob als E-Mail oder über die DVAG MeineApp: Seit Ende Juni 2021 ausgewählte Vertragsunterlagen digital erhalten

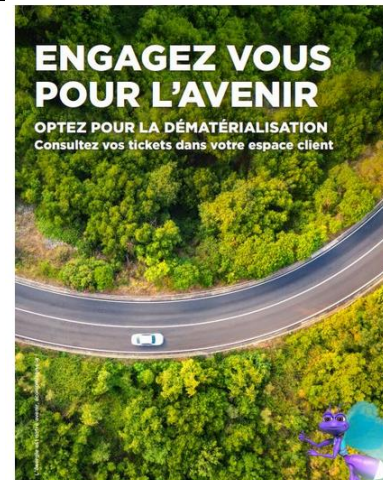
Vielen Dank! Ob Vertragsunterlagen, Beitragsrechnungen oder Schadendokumente – Sie haben sich für die digitale Vertragskommunikation mit uns entschieden.

Informieren Sie sich auf dieser Seite darüber, wie wir gemeinsam auf Papier verzichten und nachhaltig handeln.



Chaque année, les **45 millions** de factures envoyées à nos clients représentent **1000 tonnes** de papier, soit **50 camions**.

ET SI NOUS CHANGIONS CELA ENSEMBLE ?



DEVENEZ MEMBRE DU CLUB CERTAS ENERGY WWW.CLUB-CERTAS.COM



DEMATERIALIZATION DU TICKET DE TRANSACTION

Certas Energy souhaite encourager ses clients à avoir un comportement plus éco-responsable, en consultant leur ticket de transaction dans leur espace personnel plutôt que de l'imprimer.

C'est encore un pas fait afin de limiter les émissions carbone inhérentes à certaines actions.

Auparavant Certas Energy à travers le Club Certas Energy, proposait déjà à ses clients de ne pas imprimer leur ticket et de le recevoir par email à chaque transaction.

Mais l'email étant également énergivore, le souhait a été de se tourner vers une solution toujours simple et pratique pour les clients tout en cherchant à diminuer au maximum les émissions liées au ticket de transaction.

OPTEZ POUR LA DÉMATÉRIALISATION
Engagez-vous pour l'avenir
Consultez vos tickets dans votre espace client.

Devenez membre du Club Certas Energy pour maîtriser vos émissions de CO₂ et profitez de nombreux avantages. Inscrivez-vous sur www.club-certas.com ou flashez ce QR code



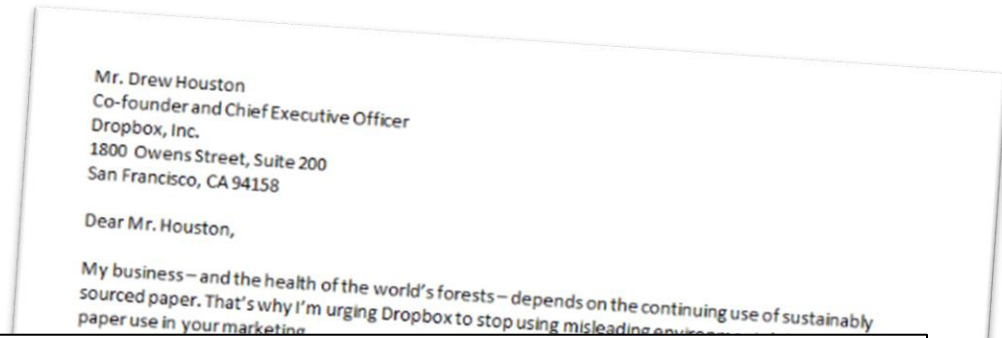
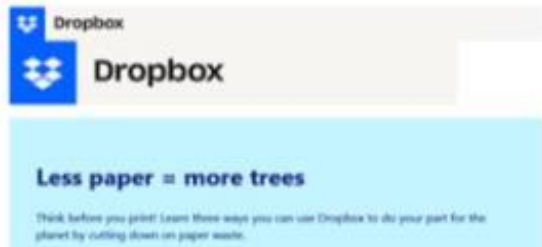
Si tous le monde joue le jeu se sont plus de 5 000km de papiers qui seront économisés. On compte sur



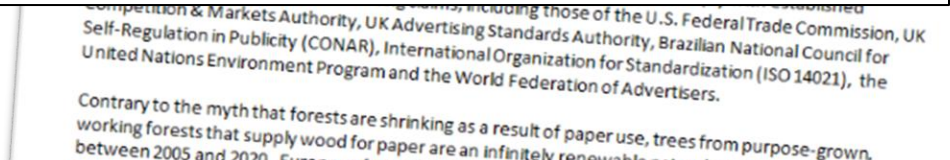
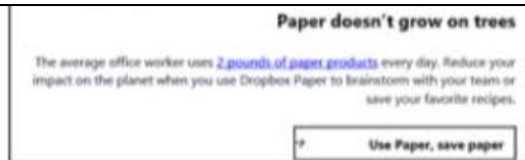
Two Sides Takes Direct Action, Example

May'22 - Two Sides flooded by complaints from around the world that Dropbox making unsubstantiated anti-paper statements. “**Less Paper = More Trees,**” using Dropbox is “**more earth-friendly,**” and that people can “**do their part for the planet**” and “**secure the future of forests**” by using Dropbox

Two Sides created template email and letter for collective action by **ALL** our stakeholders. Action in Europe, US, Canada, South America



Dropbox has **more than 700 million** registered users!
Greenwash reduces consumers' confidence in **ALL** our products



Greenwash Update – End Q1 2022

Greenwash is a global activity

- 3168 Corporates researched
- 1965 Companies engaged
- **889 have changed their messages**

Total Cumulative	Europe	ROW	Global
Number of Companies Researched	2,114	1,045	3,168
Number of Companies Engaged	1,288	657	1,965
Number of Companies Changed	574	342	889
Greenwash Success Rate	45%	52%	45%

Euro-Graph Board Meeting – 10th June 2022

Press Release 4th May 2022

TWO SIDES PRESS RELEASE

04.05.22, London 11:00 GMT

Two Sides Global Anti-Greenwash Campaign: Over 880 Companies Removed Misleading Anti-Paper Statements

Since the campaign began in 2010, globally, Two Sides has successfully challenged over 880 organisations that subject their customers to repeated greenwashing messages which are damaging to the paper, print and mailing industry.

With huge pressures on the economy; banks, telecom providers, utility companies and even governmental organisations are increasingly focused on switching their customers from paper to digital services to cut costs. All too often their customer communications attempt to mask these cost-saving efforts, justifying the switch with unfounded environmental marketing appeals such as “Go Green – Go Paperless” and “Choose e-billing and help save a tree.”

“Not only are these greenwash claims in breach of established environmental marketing rules, but they are hugely damaging to an industry which has a solid and continually improving environmental record,” says Two Sides Europe Managing Director Jonathan Tame. “Far from ‘saving trees,’ a healthy market for forest products such as paper encourages the long-term growth of forests through sustainable forest management. Many of the organisations we engage are surprised to learn that European forests have actually been growing by 1,500 football pitches every day.”

Globally, Two Sides has engaged over 1,900 organisations making misleading statements about paper. So far, over 880 of them have removed such statements from their communications and Two Sides continues to engage and inform the remaining organisations. The organisations were located throughout Europe, North and South America, South Africa, Australia and New Zealand.

In 2021, in Europe, 574 companies removed unsubstantiated claims about paper, including Lloyds Bank, RAC, Scottish Power, N Brown Group, HSBC, to name a few.

The Two Sides Campaign – Delivers an Impressive ROI. Case Study

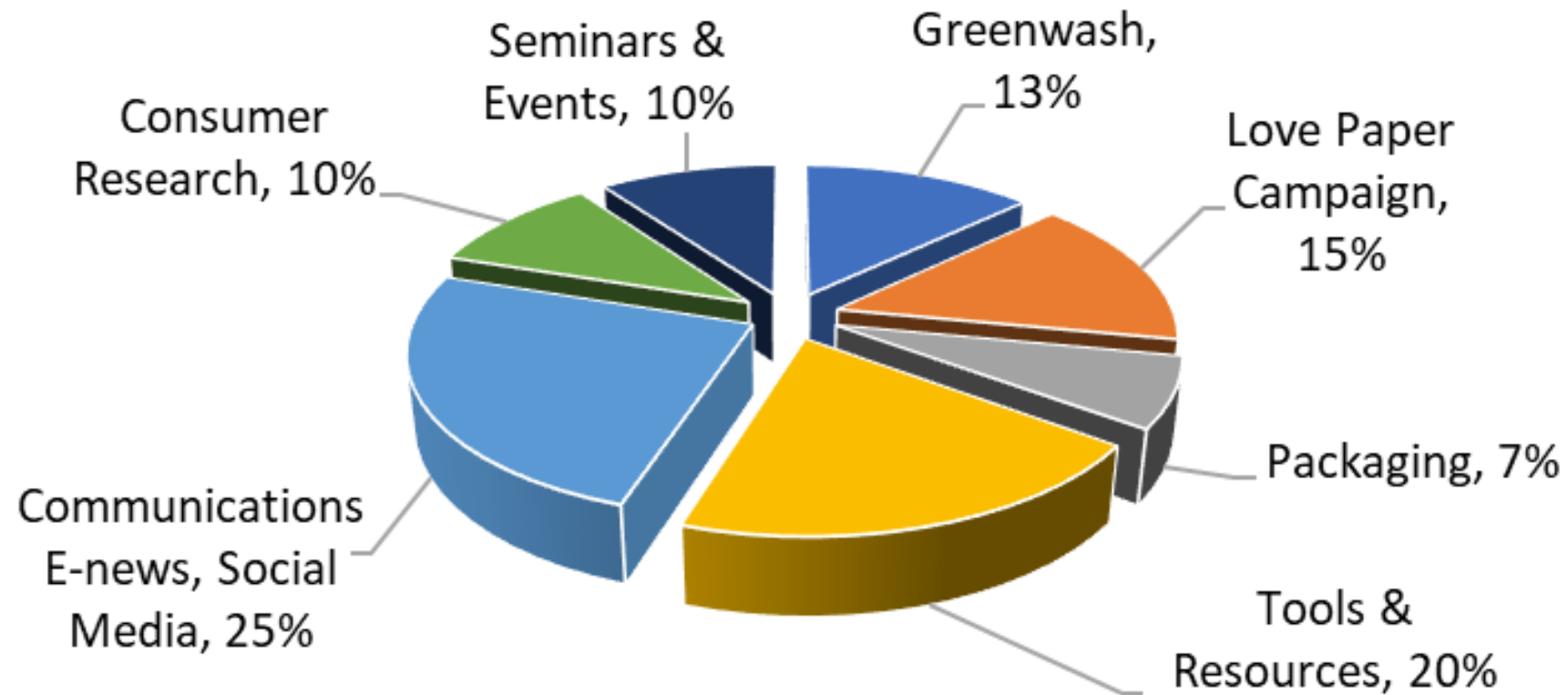
- The European paper, print and postal sector, (transactional print and mailings). is estimated to be worth **€7.8** billion¹
- **499** European* Service Providers have removed Greenwashing as a result of Two Sides engagement
- Total value of paper, print and mail preserved: **€44.7** million (est.)
- The campaign has stopped Greenwashing statements being seen, annually, over **590** million times in Europe*, **meaning millions of consumers have stopped seeing misleading environmental messages about print and paper**
- Greenwashing is a serious danger for our industry which, if left unchallenged, threatens the loss of **€337** million of value in Europe*

¹ Value of paper, print and postage for household bills and statements

*Europe/European is EU+UK

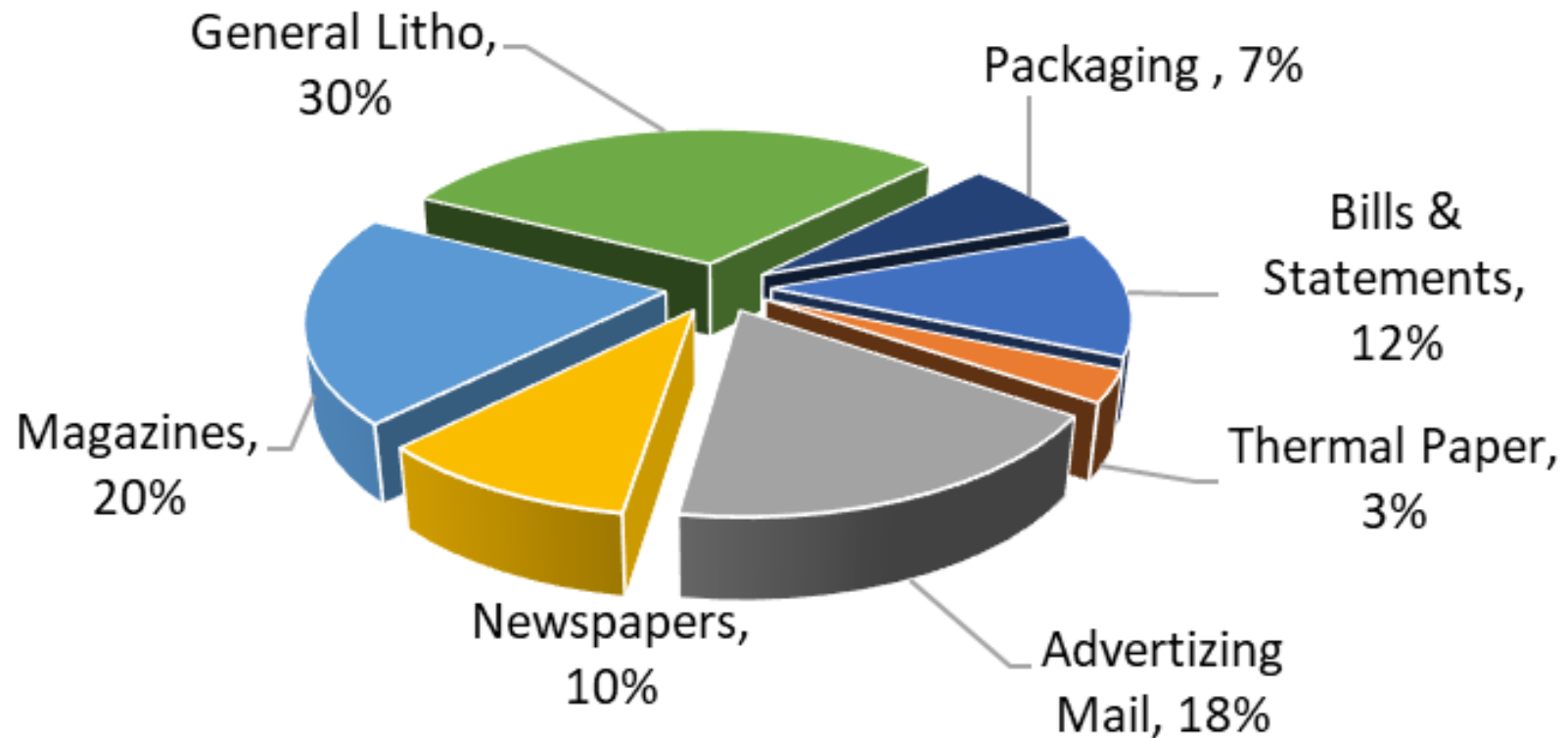
But Greenwash is not all we do!

Two Sides Activities by Time Spent



But Greenwash is not all we do!

Estimate of Time Spent by Sector



**Improving consumers'
perception of our
products**



www.lovepaper.org

Love Paper messages reach 20m+ Every Month

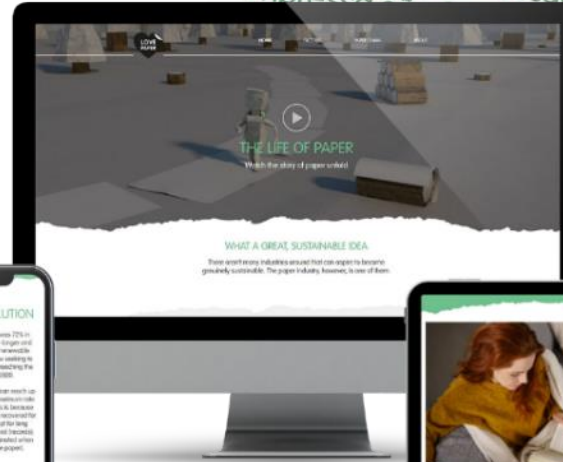
1,200 adverts est. in EU 2022



AMAR PAPEL É FÁCIL

O papel e a comunicação impressa

twosidesbrasil • Following
twosidesbrasil Temos ótimas razões para #AmarPapel e a comunicação impressa.
O papel e a comunicação impressa são ferramentas altamente eficazes na alfabetização!
Acesse: www.lovepaper.org.br



53.6 million metric tonnes (MT) of e-waste was produced across the world in 2019.
Source: Global E-waste Monitor, 2020

lovepaper_uk
lovepaper_uk It's likely you're reading this from your smartphone screen, maybe whilst watching a football episode of #myCelebrity on TV.
You might even have a smartwatch on your wrist or have a smart speaker telling you the weather for tomorrow in the background.
All of these devices add up and their impact on the environment is often forgotten.
Let's look at their true environmental impact...
In 2019, we threw away a significant 53.6 million metric tonnes (MT) of e-waste around the world that's equivalent to...

Two Sides Deutschland
27 November at 08:09
Paper flowers have gained more and more popularity in a few years. Especially for weddings and other celebrations, paper offers a unique alternative to traditional flowers. Paper flowers are definitely not as durable as their siblings made of...



TWO SIDES

Current adverts



PAPER LOVES TREES

European forests, which provide wood for making paper, paper packaging and many other products, have been growing by 1,500 football pitches every day!

Source: Food and Agriculture Organisation of the United Nations (FAO), 2005 - 2020
European Forests: EU27 + Norway, Switzerland and the UK



Discover the story of paper
www.lovepaper.org
Scan for paper facts, activities, blogs and much more!




PAPER REVOLUTION

74% of paper and 83% of paper-based packaging is recycled into new products; one of the highest recycling rates of any material in Europe!

Sources: Confederation of European Paper Industries (CEPI), 2020 and Eurostat, 2018.
Europe: EU27 + Norway, Switzerland and the UK.




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PAPER POWER

62% of the energy used to produce paper and paper-based packaging in Europe comes from renewable sources.

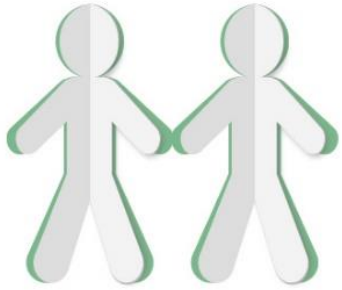
Source: Confederation of European Paper Industries (CEPI), 2020.
CEPI represents 92% of European pulp and paper production.



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New Adverts now approved by CEPI led Sustainability Steering Group



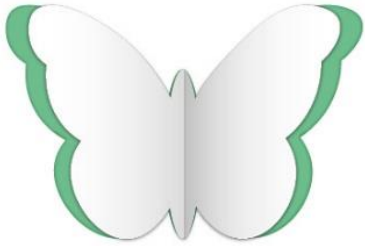

PAPER PEOPLE

The forest sector consists of forestry, the wood industry, and the pulp and paper industry. Forests provide more than 86 million green jobs globally, employs 3.5 million Europeans, and support the livelihoods of many more people.

Sources:
FAO and UNEP, The State of the World's Forests, 2020.
GreenSource, The Added Value of the Forest-based Industry, 2021.




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Scan for paper facts, activities,
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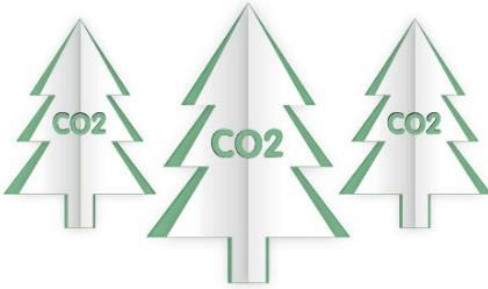

PAPER & BIODIVERSITY

To ensure the long-term health of European forests, sustainable forest management underpins how the paper industry operates and sources its main raw material. Forests cover 31% of the world's total land area and contain most of the world's earthly biodiversity.

Source: FAO and UNEP, The State of World's Forests, 2020




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blogs and much more!




PAPER LOCKS IN CARBON

European forests act as a major carbon sink. The paper industry's key raw material, wood fibre, absorbs carbon dioxide from the atmosphere as it grows, and this is locked-up for the duration of the fibre's life cycle.

Source:
FAO, Global Forest Resources Assessment, 2010



Discover the story of paper
www.lovepaper.org
Scan for paper facts, activities,
blogs and much more!





Resources & Materials

**Fact based materials for our
industry to use**



Resources for the industry to use

En France, les émissions directes de CO₂ de l'industrie de la pâte et du papier ont diminué de 38 % entre 2005 et 2018.

Source: COPACEL statistiques 2019.

Découvrez la performance environnementale du papier sur www.fr.twosides.info

European forests, which provide wood for making paper, paper packaging, and many other products, have been growing by 1,500 football pitches every day!

Source: FAO data, 2005-2020.

to find out more interesting facts, visit www.twosides.info

Zwischen 2005 und 2020 wuchsen die Wälder Europas um eine Fläche von 58.000 km² – eine Fläche, die größer ist als die Schweiz.

Quelle: FAO, 2020.

Für weitere Fakten besuchen Sie bitte www.de.twosides.info

Personalised for All Members

Paper Production and Sustainable Forests

The Facts

The pulp and paper industry champions, and promotes, sustainable forest management to provide a reliable supply of wood fibre, the key raw material for its products. Well-managed forests bring multiple benefits for society, with no trade-offs: ecosystems services and biodiversity. Europe's forests, from where the region's paper mills source over 92% of their wood fibre, have been growing by an area equivalent to 1,500 football pitches every year since 2005, thanks to the support of the state and private stakeholders.

In Europe, wood comes from sustainably managed forests, where the cycle of planting, growing and logging is carefully controlled.

Cellulose fibre is the primary raw material for paper making. Of the fibre used by the European pulp and paper industry, 92% comes from virgin wood fibre and 8% from paper fibre recycling.

In principle, cellulose fibre can be derived from almost any plant and animal source, but in the industry, such as agricultural waste, however, used in the domestic sector. Because of its renewable and recyclable nature, technical properties, widespread availability and environmental benefits.

**Eine natürliche Entscheidung
Papiertragetaschen**

Die Fakten

Regelmäßig werden wir mit den wachsenden Auswirkungen unserer Plastiknutzung konfrontiert, u.a. auch durch die von Plastik reagiert. Während eine allgemeine Verringerung städtische und weniger verschwendende Abfallwirtschaft leistet, natürlichen und erneuerbaren Eigenschaften eine attraktive und die Vorteile von Papiertragetaschen gegenüber Kunststofftragetaschen.

**Papier et Fibres
D'origines Alternatives**

Les Faits

L'industrie du papier/carton repose sur l'utilisation responsable et économiquement viable de la fibre de cellulose. Elle permet de produire une grande variété de produits à base de papier et de cellulose que nous utilisons au quotidien, comme les journaux, les magazines, les livres, les sacs en papier, les boîtes et les caisses en carton, ou encore des produits d'hygiène. La fibre provient le plus souvent du bois ou du recyclage du papier, mais certains produits utilisent des fibres de cellulose issues d'autres sources agricoles.

Que sont les "fibres d'origines alternatives" ?

La fabrication du papier repose sur l'utilisation de la cellulose, fibre végétale présente dans le bois des arbres, mais aussi dans d'autres végétaux. La fibre de cellulose issue du bois (celle qui est la plus courante) est de loin la source la plus abondante utilisée pour la fabrication du papier et du carton, en raison de sa disponibilité, de son utilisation économique, et de ses caractéristiques techniques. La cellulose peut aussi provenir d'autres végétaux, et historiquement, ou pour des applications plus particulières, l'herbe, le bambou, le chanvre, ou d'autres parties de certaines plantes ont pu être utilisées.

Histoire

Jusqu'au milieu du XX^e siècle en Europe, le papier était traditionnellement fabriqué à partir de chiffons issus de la décoloration de vêtements, et parfois de matières végétales comme la paille. L'évolution technique de la production de pâte à papier et du blanchiment, ainsi que les facteurs économiques, expliquent le développement de l'usage d'autres fibres, notamment l'alloë (un herbacé) et la fibre de bois. Depuis les années 1940, la fabrication du papier en Europe et en Amérique du Nord s'est développée à partir de la fibre de bois, en raison de sa nature renouvelable et recyclable, de ses propriétés techniques, de son coût relativement faible et de sa disponibilité tout au long de l'année. Alors que certains producteurs en Asie (notamment en Chine et en Inde) ont continué à utiliser des déchets agricoles tels que la paille, les volumes produits par des petites usines ont fortement diminué, ces dernières années, en raison de la fermeture de capacités obsolètes imposée par le gouvernement. Ainsi, on peut aujourd'hui estimer que 97% de fibres dans le monde provient directement du bois ou du papier recyclé pour le recyclage. Toutefois, on continue à explorer à petite échelle la possibilité d'utiliser des fibres de substitution en complément du bois.

Les types de fibres d'origines alternatives

En principe, presque toutes les fibres végétales peuvent être utilisées pour fabriquer du papier, mais les caractéristiques varient et sont commercialement viables.

- La paille était autrefois largement utilisée, mais elle a traditionnellement souffert d'inconvénients, tels qu'une capacité à retenir l'eau pendant la fabrication du papier et un potentiel de pollution plus important, associés à un coût plus élevé et une qualité inférieure par rapport à la pâte de bois.
- Le coton et le lin restent d'excellentes fibres pour la fabrication du papier, avec une très forte teneur en cellulose. Cela leur confère une résistance supérieure et un toucher luxueux, mais à un coût plus élevé.
- Le bambou présente des caractéristiques techniques similaires à celles de la pâte de bois et est utilisé commercialement dans certaines régions du monde, notamment en Asie, bien qu'en quantités relativement faibles.
- Le bagasse, le résidu fibreux obtenu après extraction du sucre de la canne à sucre, se comporte comme la paille mais est plus difficile à traiter.
- La bafleuse sucrière présenterait un certain potentiel, notamment en raison de sa faible teneur en lignine (la molécule qui lie les fibres entre elles, mais dont l'inconvénient est d'altérer les propriétés du papier). L'utilisation de la bafleuse ne s'est ainsi pas développée à l'échelle industrielle.
- Il est important de noter qu'une fibre alternative est rarement utilisée seule. Pour des raisons techniques et économiques, le rapport entre les fibres de substitution et la pâte de bois est relativement faible, généralement jusqu'à 20%.

EU-Staaten müssen den Verbrauch von Plastikflaschen drastisch einschränken

Im Jahr 2015 führte die EU Rechtsvorschriften für Plastikflaschen ein, mit dem Ziel, den durchschnittlichen Verbrauch pro Person von rund 200 Litern pro Jahr zu senken. Bis Ende 2019 soll der Pro-Kopf-Verbrauch auf 70 und bis 2025 auf 40 Plastikflaschen pro Person fallen.

Mondt erhöht seit 2002 eine Steuer auf Einweg-Plastikflaschen und hat so den Verbrauch um 95 % reduziert. Andere Länder haben seitdem ebenfalls Maßnahmen ergriffen, um den Verbrauch von Plastikflaschen zu senken, darunter Italien wie in Frankreich und Belgien in Österreich liegt ein Gesetzessatzwerk dazu vor, Geldstrafen in Österreich, Estland, den Niederlanden, Spanien und dem Vereinigten Königreich und bewilligte Verpflichtungen (Deutschland und Finnland). Diese Maßnahmen haben Verbraucher darin bestärkt, wiederverwendbare Einkaufsflößen zu benutzen und einige Einzelhändler dazu bewegt, Alternativen zu traditionellen, nicht biologisch abbaubaren Kunststoff zu anbieten.

Papierflaschen als attraktive Alternative

Der Rohstoff für Papierflaschen – Holz – ist eine erneuerbare und nachhaltige Ressource. Zwischen 2005 und 2020 wuchs die europäischen Wälder um eine Fläche so groß wie die Schweiz, was 1.500 Fußballplätzen pro Tag entspricht.

Die Recyclingrate für Papier- und Kartonverpackungen in der EU beträgt 85 % (58 % weltweit). Selbst wenn eine Papierflasche unermesslich entsorgt wird, hat dies aufgrund ihrer natürlichen kompostierbaren Eigenschaften eine deutlich geringere Auswirkung auf die Umwelt als eine Plastikflasche.

**Print & Papier
Mythen & Fakten**

Print- und Papierprodukte erzielen größtenteils Umwelt- & Geschäften

www.de.twosides.info

Did You Know

Paper and paper products only account for 0.8% of European greenhouse gas emissions.

Discover the facts about paper www.twosides.info

European Environmental Agency (EEA), 2020



Research

**Consumer research to understand the
issues and build our arguments**



Trend Tracker Survey

- The only industry research that tracks changing consumer preferences, perceptions and attitudes towards print, paper and paper packaging
 - Environmental Perceptions
 - Reading Habits
 - Packaging Preferences
- Biennial Research - next to be published April 2023
- Wide stakeholder engagement
- Provides facts and messages for the industry to use



Questions following Euro-Graph changes

Two Sides has developed, with Euro-Graph encouragement and support, as a multi-country, locally delivered, campaign providing culturally relevant messages about the sustainability of our products

We are currently unsure, without knowing what our funding will be for next year, how the campaign will look in future

- Can we plan on financial support continuing at current level from companies indicating continued support?
- Might some member contributions be increased to balance lost funding?
- Might companies, having indicated a withdrawal of support, be persuaded to remain?

Actions following Euro-Graph changes

- We will contact Euro-Graph members individually to clarify funding
- 2023 activities and budget need planning
- Staff and country managers need informing of likely changes, but we want to first better understand the likely funding for 2023 and the extent to which this will affect activities and staffing

Other Actions following Euro-Graph changes

- Ask Euro-Graph members to request packaging divisions' support and, upstream, pulp/equipment etc., participation
- Lars Lundin (Holmen) to remain on Two Sides board to year end. From 2023, propose 2 supporting paper producers to join Two Sides board (meet twice a year)
- Two Sides intends to host on-line webinars twice a year to inform funders of activities and resources.
- Marketing Steering Group and Sustainability Steering Group will be adjusted to reflect supporting Euro-Graph members

Two Sides was created by our industry to tackle misinformation

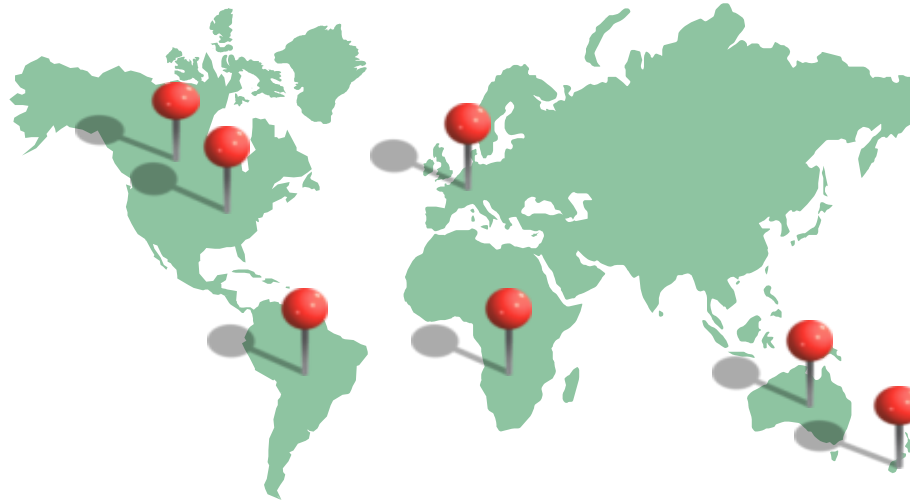
Our campaigns ensure that forest-based products will continue to be seen as the preferred and sustainable communication and packaging material

The impact upon the campaign from this significant loss of funding, and the change to the method of collection from the graphic sector, can only be assessed once the future funding and support is clear

Print and Paper, Attractive and Sustainable

Two Sides active in:

Australia and New Zealand
Europe
North America (USA and Canada)
South Africa
South America



- Every year there are over 250,000 visitors to Two Sides websites and more than 1.5 million electronic newsletters are distributed
- Love Paper campaign reaching over 20 million people a year worth an estimated €3.5 million advertising
- Social Media reaching 12 million Consumers and Business Professionals
- Telling the great sustainability story of print and paper