



Two Sides

Euro-Graph General Assembly

23rd November 2022



Funding Update

- Current total cash funding €712.500 (2022)
- Euro-Graph current funding 2022: €370.000. (52% of total cash collected)
- Continued discussions with 23 Euro-Graph members
- Funding from graphic sector 2023 is still uncertain but there will be a shortfall
- Two Sides has reserves to assist with the changes
- Increased focus to raise additional funding from other sectors where Two Sides work and messages are highly relevant – Tissue, Packaging

Funding Update

Funding confirmed 2023

UPM-Kymmene
Stora Enso
Norske Skog
Holmen Paper
The Navigator Company
Burgo
Mondi
Lecta Group
Sappi
Papierfabrik Palm
Steinbeis Papier
MM Board & Paper
Perlen Papier
Leipa
Fedrigoni Group
Arctic Paper*
Kabel Premium Pulp & Paper*
Heinzel - Laakirchen*
Grupo Iberpapel Gestión (Zicunaga)*
Crown van Gelder

Have not yet responded

Sylvamo
Smurfit Kappa Group - Parenco
Papresa

* Have decided not to support. Two Sides has requested reconsideration

The Two Sides Campaign - Unique

- Greenwash. Two Sides challenges corporates and NGOs where misinformation grows if left unchallenged. Greenwash influences consumer attitudes towards the use of paper and paper-based packaging and leads to reducing demand for **all** our products.
- The 'Love Paper' campaign builds an emotional attachment with consumers for Paper and Paper-based Packaging
- Our communications reach more than 250 million consumers every year via social media, digital channels and page advertising
- With Materials and Fact sheets we provide our industry with credible facts and information concerning the sustainability of our products
- We work closely with industry associations to align our sustainability communications
- Two Sides does not lobby policy makers

Anti-Greenwash

Greenwash is increasing across Europe

GENERALI

PRIVATKUNDEN GESCHÄFTSKUNDEN ÜBER GENERALI KARRIERE SERVICE & KONTAKT

SELF SERVICE SCHADEN MELDEN KONTAKT APPS RATGEBER JOURNAL

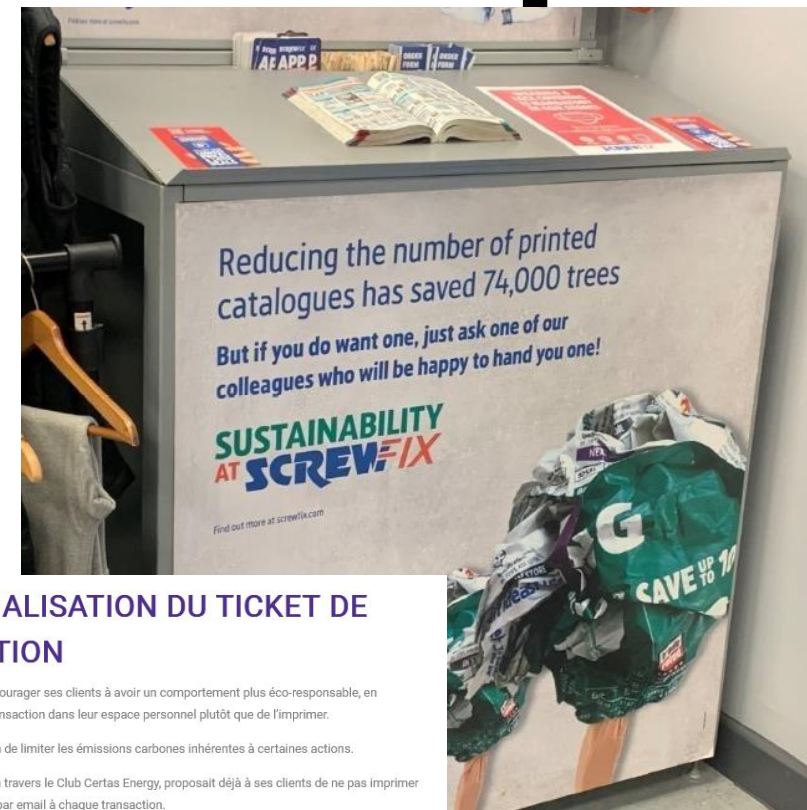
SERVICE & KONTAKT / SELF SERVICE

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 Pap



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

ENGAGEZ VOUS POUR L'AVENIR
OPTEZ POUR LA DÉMATÉRIALISATION
 Consultez vos tickets dans votre espace client

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.

- 3 litres d'eau économisés/ticket
- 5040 litres de papier économisés/ticket
- 5 g de CO2 économisés/ticket

Devenez membre du Club Certas Energy pour maîtriser vos émissions de CO2 et profiter 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 vous.



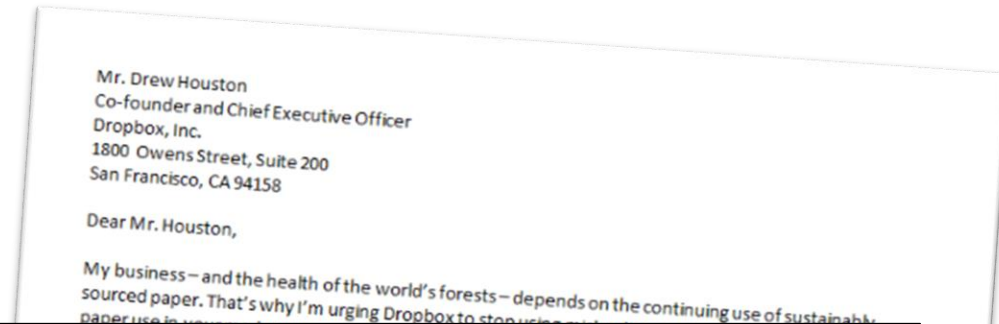
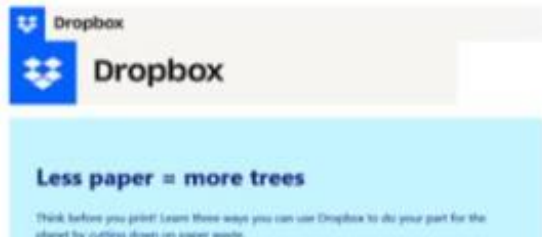
ET SI NOUS CHANGIONS CELA ENSEMBLE ?



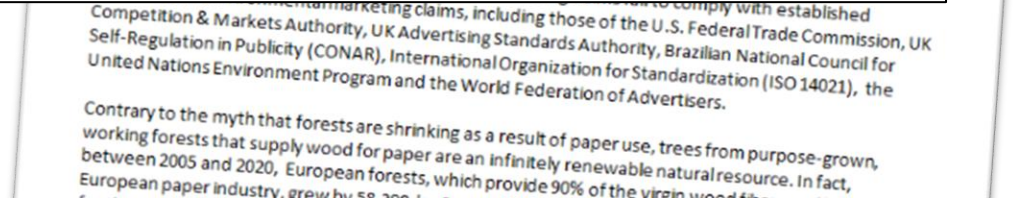
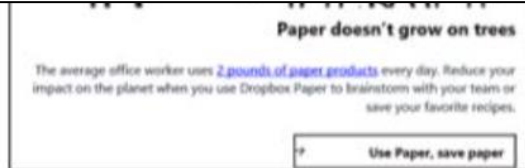
Two Sides Takes Direct Action, Example

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

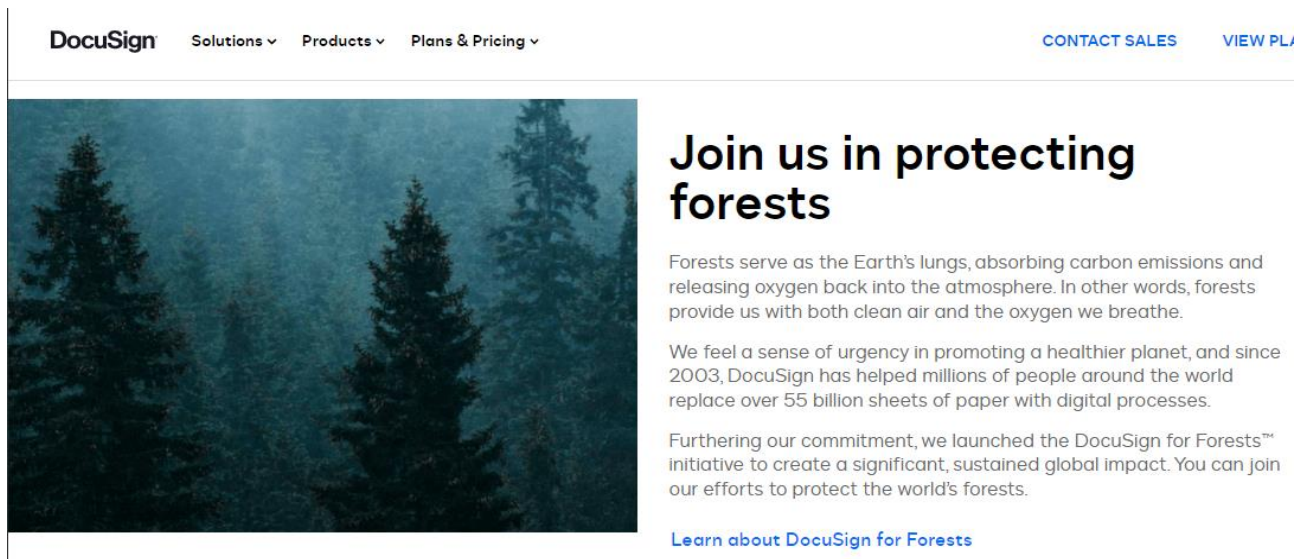
Two Sides created template email and letter for collective action by **ALL** our stakeholders. Action in Europe, US, Canada, South America



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



Greenwash used by global digital players



DocuSign Solutions Products Plans & Pricing CONTACT SALES VIEW PL

Join us in protecting forests

Forests serve as the Earth's lungs, absorbing carbon emissions and releasing oxygen back into the atmosphere. In other words, forests provide us with both clean air and the oxygen we breathe.

We feel a sense of urgency in promoting a healthier planet, and since 2003, DocuSign has helped millions of people around the world replace over 55 billion sheets of paper with digital processes.

Furthering our commitment, we launched the DocuSign for Forests™ initiative to create a significant, sustained global impact. You can join our efforts to protect the world's forests.

[Learn about DocuSign for Forests](#)

DocuSign

Active across Europe promoting digital aggressively against paper.

Referred Oct'22 to French advertising regulator

Regulator has accepted the case but DocuSign are appealing

Together we've saved



55 billion sheets of paper



6 million trees



over 5.9 billion gallons of water

Tweet



DocuSign France
@DocuSignFR

#WorldEnvironmentDay Nous avons qu'une seule planète. 🌍 Prenons-en soin. Rejoignez-nous pour préserver nos forêts, économiser du papier et de l'eau, et réduire les émissions carbone. 🌲

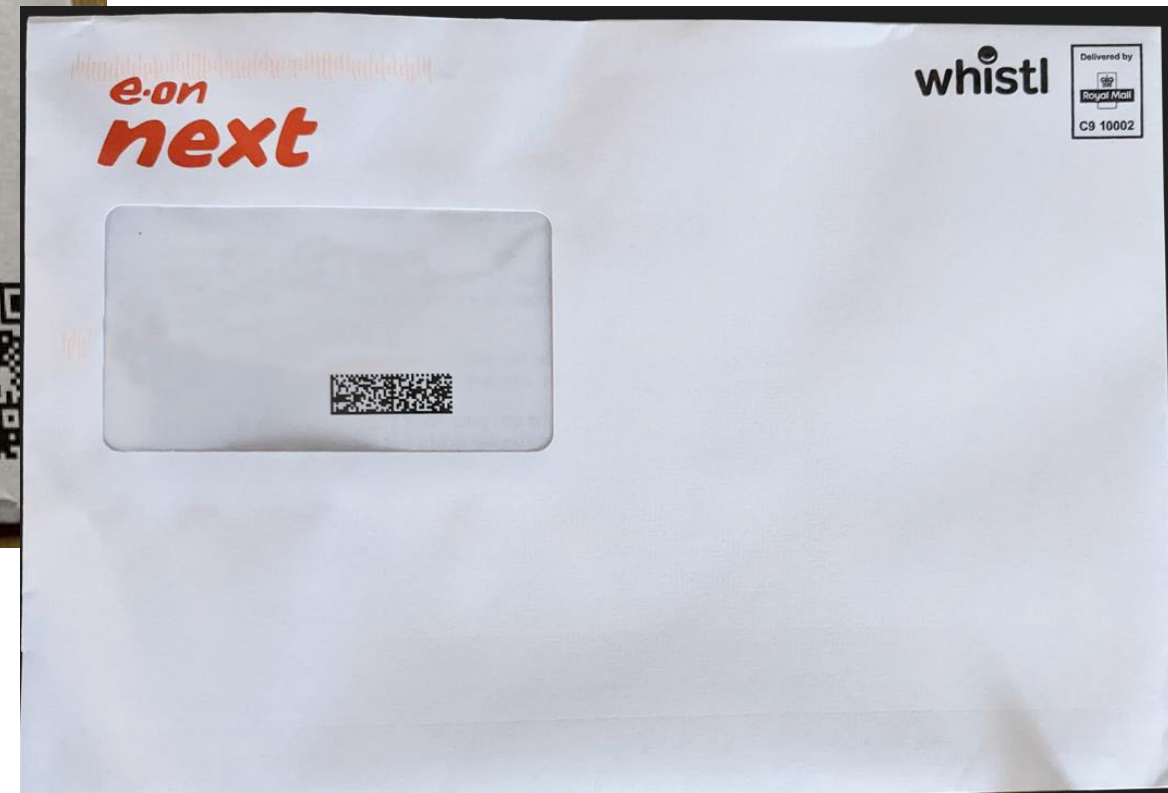


Example of Recent Success



We have removed the wording relating to “saving trees” from our website and social media messaging.

Kirin Kalsi - Head of Legal



Value of Greenwash campaign

Research in 2021, with consumer research organisation Censuswide, investigated the impacts of Greenwash on the European paper, print, and postal sector

- **4.3%** of European consumers surveyed are persuaded to switch from paper to digital if they see Greenwashing
- The European paper, print and postal sector is estimated to be worth **€7.8** billion¹
- **499** European* Service Providers have removed Greenwashing as a result of Two Sides engagement.
- The campaign has stopped Greenwashing statements being seen, annually, over **590** million times in Europe*.
- Total value of paper, print and mail preserved: **€44.7** million (est.)
- Greenwashing is a serious danger for our industry which, if left unchallenged, threatens the loss of **€337** million in Europe*
- Employs over 3 million people in more than 120,000 European businesses

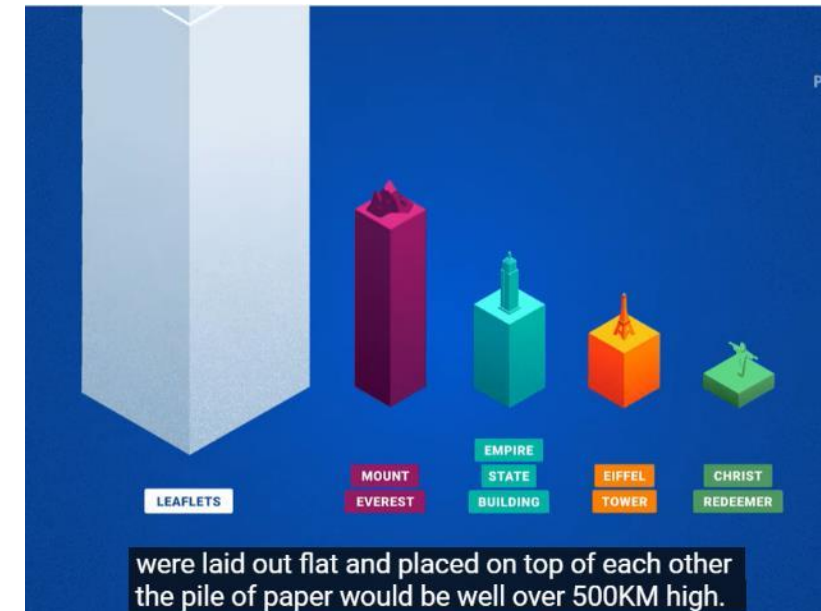
¹ Value of paper, print and postage for household bills and statements

*Europe/European is EU+UK

Greenwash – Not just bills and Statements

Pharmaledger

- Initiative from pharmaceutical companies to push product information leaflets on-line
- Two Sides **success** challenging the misleading environmental claims, which have been removed



Patients then just have to scan a medicine's box via an app on a smartphone to obtain the latest approved digital leaflet with trusted information. Regulators have more efficiency, and with less printed paper, the industry can reduce its environmental footprint. It also allows patients to be part of the solution against counterfeit medicines. You can find out more about the idea behind this use case by watching our video.

Catalogues and advertising mail

- OBI – Large German retailer of DIY and homeware
- Communication that they will no longer produce catalogues and direct mail. Paper ‘not sustainable’ messages
- Engaged directly by Two Sides Germany, and supporting BVDM and VDMA associations, that these statements are misleading and Greenwashing
- Awaiting response but understand that OBI will continue to use print



Diageo starts programme to remove cardboard gift boxes from premium Scotch portfolio

27th April: Today, Diageo announced the start of a programme to phase out the use of 183 million cardboard gift boxes from its premium Scotch portfolio around the world.

Every year, nearly five million tonnes of cardboard and paper is packaging waste in the UK alone, and despite its ability to be recycled, increased demand has led to cardboard shortages.

Changes to EU Packaging Waste Directive, to reduce secondary packaging, will lead to an increase of Greenwash messages in packaging

Greenwash Update – End Q3 2022

Greenwash is a global activity

- 3341 Corporates researched
- 2113 Companies engaged
- **974 (630 Europe) have changed their messages**



EUROMASTER



Euro-Graph Board Meeting – 22nd November 2022

Press Release 25th October 2022

TWO SIDES PRESS RELEASE

04.05.22, London 11:00 GMT

Two Sides global Anti-Greenwash Campaign: Over 970 Companies Removed Misleading Anti-Paper Statements

Since the campaign began in 2010, globally, Two Sides has successfully challenged over 970 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 2110 organisations making misleading statements about paper. So far, over 970 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 Europe, to date, 630 companies have removed unsubstantiated claims about paper, including Lloyds Bank, RAC, Scottish Power, N Brown Group, HSBC, to name a few.

**Improving consumers'
perception of our
products**



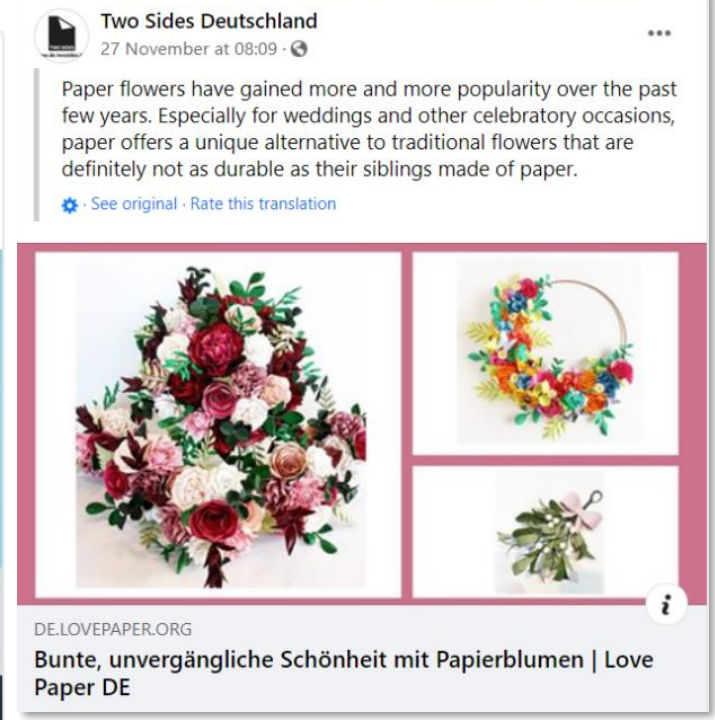
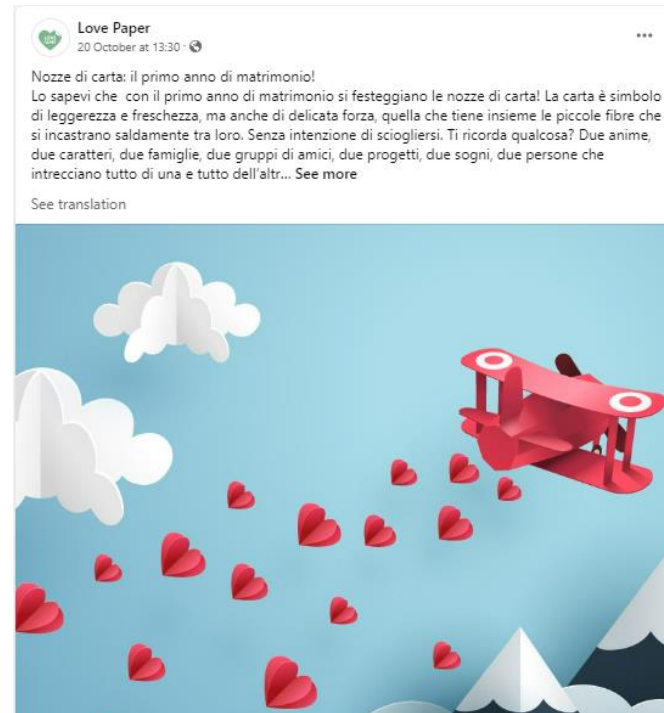
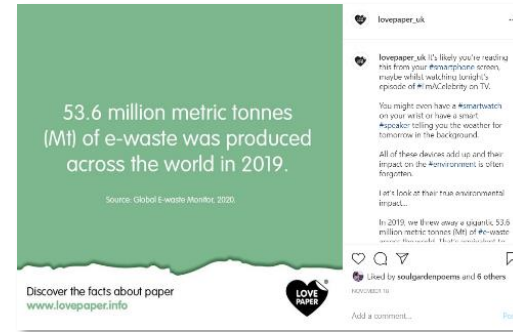
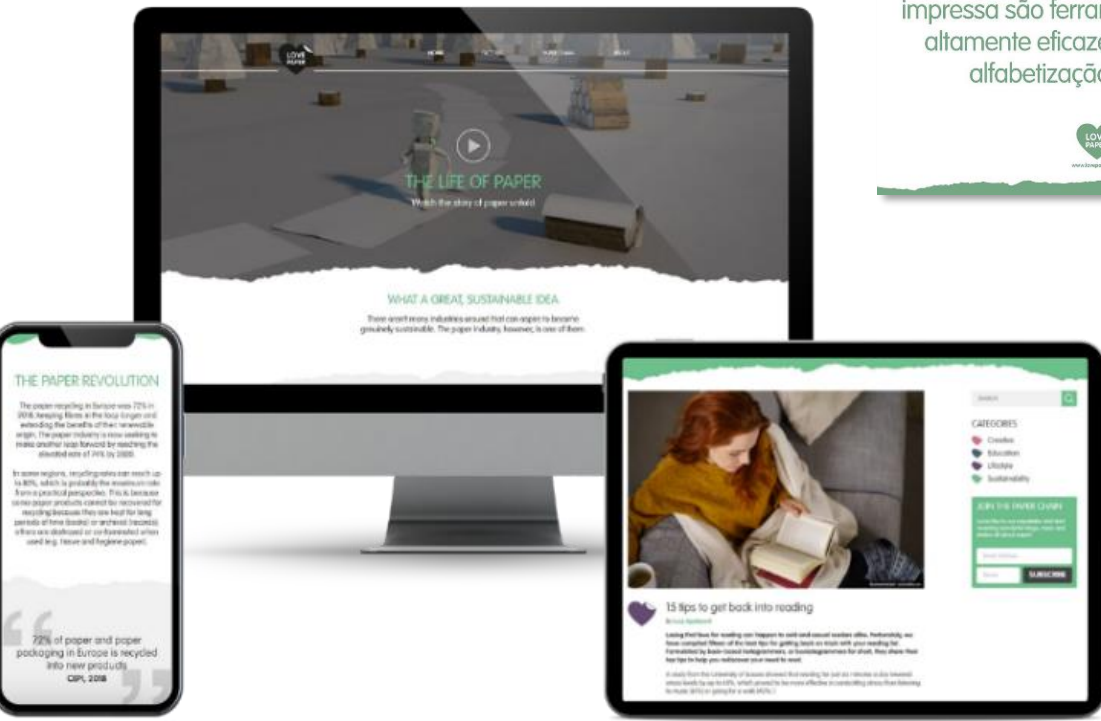
www.lovepaper.org

Love Paper advertising reach 240m+ consumers every year through print adverts



2022 to date
>1,350 adverts

Love Paper messages reach 13m+ consumers this year through social media



Helping Brands tell the sustainable story of their paper use

<https://www.twosides.info/love-paper-logo-in-use/>

COVID-19 EMERGENCY APPEAL

LENORE AND ROGER NEED YOUR HELP RIGHT NOW

mencap

We are Mencap

The leading voice of learning disability. Because everything we do is about valuing and supporting people with a learning disability, and their families and carers.

Our vision is a world where people with a learning disability are valued equally, listened to and included.

But we know we will only ever achieve this wonderful vision with the support of generous people like you. That's why we urgently need your support this Christmas.

mencap

123 Golden Lane
London
EC1Y 0RT
020 7454 0454
mencap.org.uk

Learning Disability Helpline
0808 808 1111
helpline@mencap.org.uk

@mencap_charity
Facebook.com/Mencap

FR FUNDRAISING REGULATOR

recycle

LOVE PAPER

Royal Mencap Society, Registered office: 123 Golden Lane, London EC1Y 0RT
Company Limited by Guarantee, Company Registered Number 250417 (England and Wales)
Registered Charity Number 222377 (England and Wales), SC041079 (Scotland)

Euro-Graph Board Meeting – 22nd November 2022

TWO SIDES

ABOUT MYTHS & FACTS RESOURCES NEWS & MEDIA CONTACT US

LOVE PAPER LOGO IN USE

Love Paper is a global campaign promoting the sustainable and attractive attributes of print, paper and paper packaging.

Run by the not-for-profit organisation, Two Sides, the campaign seeks to tell consumers across the world all the positive stories about paper, print and paper packaging from its environmental credentials to its ability to improve mental wellbeing, learning and enhance creativity.

The Love Paper logo is a registered trademark that reaches over 20 million consumers every month through advertising in newspapers and magazines. We encourage brands, retailers and print agencies to contact us about the use of the Love Paper logo. It can help enhance your own sustainability messaging, which is perfectly demonstrated by the below examples.

Members of Two Sides have exclusive rights to use the Love Paper branding, and the many tools and resources we create. Find out more about becoming a member here.

If you are a brand, publisher or organisation that would like to use the Love Paper logo, please email info@twosides.org.

- Argos Catalogues
- BBC Good Food Paper Wrap
- Cotton Traders Paper Wraps, Catalogues & Mailings
- Sainsbury's Promotional Mailing Envelopes
- Birmingham City University Prospectus
- RSPCA Envelopes
- Pioneer Paper Wrapping Sleeve
- Oliver Bonas Catalogues
- Habitat Catalogue
- Mencap Leaflet
- Papier Catalogue
- Graham & Green Catalogue
- Mint Velvet Catalogue
- Rolls Catalogue
- Space NK Brochure
- Top Of The Pops Paper Wrap

Opportunity for Love Paper to increase consumer reach through Packaging

Supports the story that retailers are trying to tell



www.lovepaper.org



www.lovepaper.org



www.lovepaper.org



www.lovepaper.org

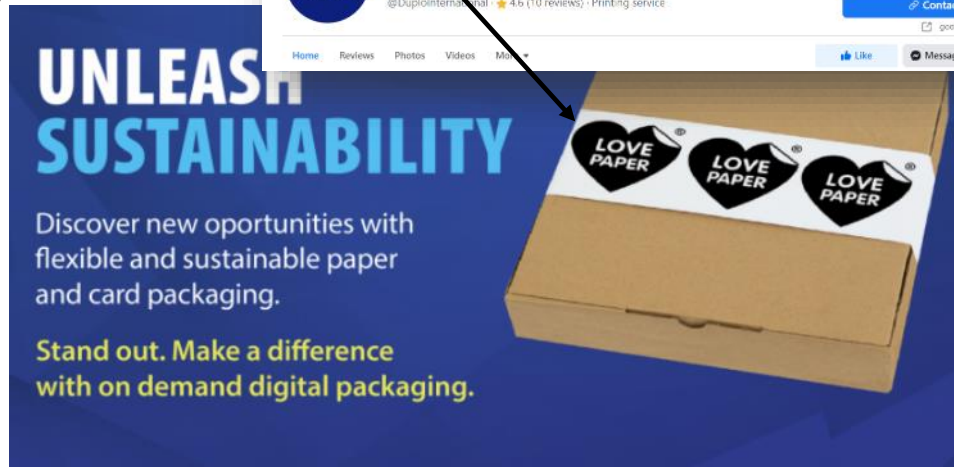
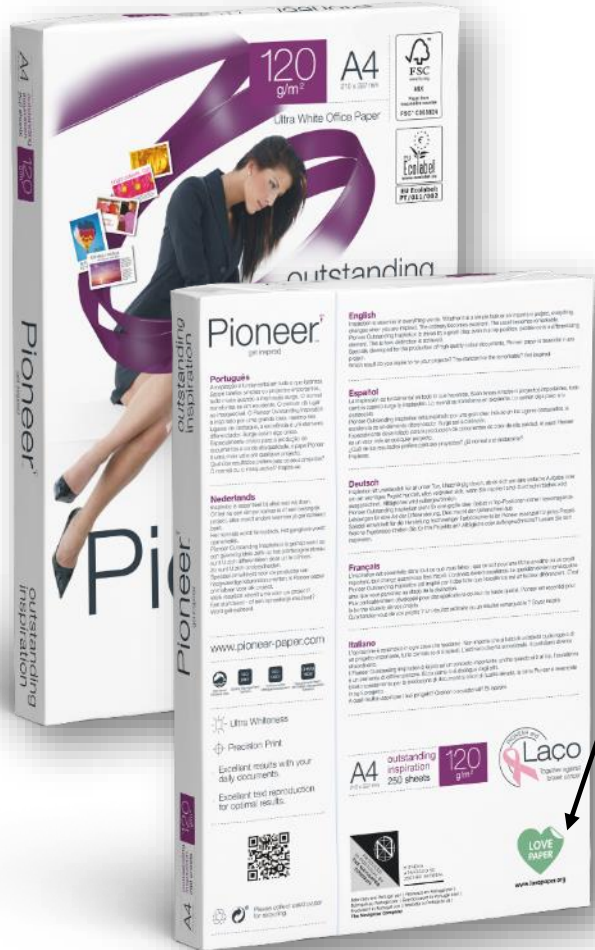


www.lovepaper.org



www.lovepaper.org

Encourage our own industry to use the logo



Love Paper is a campaign, run by paper advocacy group Two Sides, that informs consumers of the positive stories about print, paper and paper packaging. Antalis have been a proud and supportive member of Two Sides for many years. We both love everything about paper, from its environmental credentials to its ability to improve mental well-being, learning and enhance creativity. In fact, there aren't many industries around that can aspire to become genuinely sustainable. The paper industry, however, is one of them.

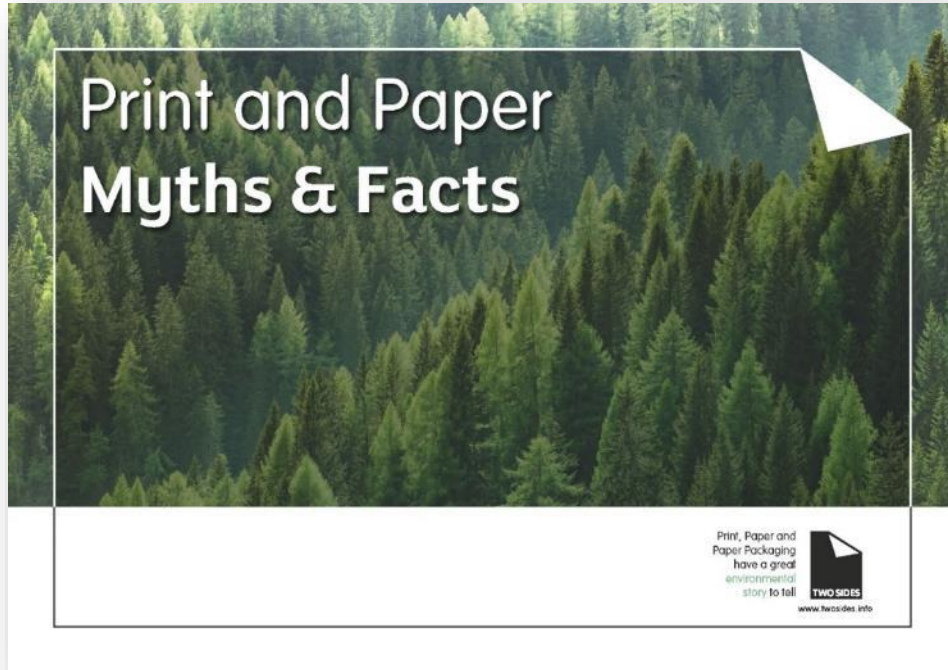


SHARING SOME LOVE... DISCOVER OUR ANIMATED VIDEOS!



Resources and Marketing Materials

Myths and Facts



Packaging Booklet



When it comes to the sustainability of Print and Paper it is important to separate the Facts from the Myths.

The European paper industry is a world leader when it comes to sustainably sourced raw materials, renewable energy and recycling rates.

Not the myths organic paper are still prevalent amongst consumers. A 2021 survey by Two Sides revealed that 64% of European consumers believe European forests are shrinking when, in fact, they have been growing by an average of 1.5 billion tonnes every day.

The total volume of European forests is approximately 28 billion m³, a figure which is currently growing by about 40 million m³ annually.

The survey also revealed that 38% of European consumers believe paper is a wasteful product and 27% believe paper is bad for the environment.

When the source of these misconceptions is the abundance of misleading information about paper and its impact on the environment, paper has seen the profound communications medium for 2,000 years. In today's digital world it continues to be highly effective and produced, used and disposed of responsibly, is inherently sustainable.

Two Sides seeks to ensure that, by fostering a better understanding of our industry's environmental credentials, print and paper, through its myriad of uses, the commercial applications to the basis of learning and creativity, remain an essential medium for many generations to come.

About Two Sides

Two Sides is a not-for-profit, global initiative promoting the unique, sustainable and attractive attributes of print, paper and paper packaging.

Find out more at www.twosides.info

Print, Paper and Paper Packaging have a great environmental story to tell

TWO SIDES

www.twosides.info

01. **The Fact** - European forests have been growing by over 1,500 football pitches every day
03. **The Fact** - Sustainable forest management preserves biodiversity and safeguards forests for future generations
05. **The Fact** - Paper is highly recycled and naturally sustainable
07. **The Fact** - Virgin fibres from sustainably managed forests are needed to maintain the paper cycle
09. **The Fact** - Most of the energy used is renewable and carbon intensity is surprisingly low
11. **The Fact** - Paper production is dependent on water, yet relatively little is consumed
13. **The Fact** - The paper industry supports a circular economy
15. **The Fact** - Electronic communication also has environmental impacts
17. **The Fact** - Many consumers value paper-based communication
19. **Glossary**
20. **Sources**

Paper Packaging Is Part Of The Circular Economy

Paper packaging fits into the circular economy model seamlessly. Its raw material, wood fibre, is a renewable, natural and sustainable resource. Paper packaging is easily collected and recycled, ensuring these valuable fibres are used time and time again.

A circular economy is a systemic approach to economic development designed to benefit businesses, society, and the environment. In contrast to the 'take-make-waste' linear model, a circular economy is regenerative by design and aims to gradually decouple growth from the consumption of finite resources.

Ein Nachhaltiger Konsum

The European paper industry is building on decades of work done to make its industrial model circular, making it one of the most sustainable industries in Europe.

It relies on raw materials, pulp derived from processing wood, which is inherently sustainable as it comes from sustainably managed forests. It has achieved 26% decarbonisation since 2005 and has become an anchor industry for industrial symbiosis, sharing materials, heat energy and water.

Paper is recycled at a rate of 74% (2020) in Europe, which is the highest recycling rate for paper in the world. Paper packaging has an even higher recycling rate at 83% (2020) and more paper-based packaging is recycled than all other packaging materials combined. The paper industry strives to further increase recycling and material use of recycling residues through the sharing of best practice and the development of cross-sectorial alliances.

The European paper industry has been at the forefront of industrial change, pioneering cross-sector collaborations and structural changes to achieve green goals.

In 2019, the Confederation of European Paper Industries (CEPI) initiated '4evergreen', an ambitious cross-industry alliance. Members came from across the fibre-based packaging value chain, from paper and board producers, packaging converters, and brand owners and retailers, to technology and material suppliers, waste sorters and collectors. '4evergreen' seeks innovation in packaging performance and functionality, as well as improving performance in recycling systems to reach the full potential of the circular economy.

Collaboration throughout the supply chain is fundamental to the success of the circular economy of the future.

Fact Sheets

1. Renewable Energy and Carbon Footprint
2. Paper Production and Sustainable Forests
3. Paper Recovery and Recycling
4. Paper's Water Footprint
5. Paper Bags, The Natural Choice
6. What's More Hygienic: Electronic Hand Dryers or Paper Towels?
7. Paper From Alternative Fibres
8. Greenwash
9. Paper Packaging, The Natural Choice
10. Forest Benefits and Biodiversity

All fact sheets updated in 2021 and will be updated 2023



Paper Production and Sustainable Forests
The Facts
 The pulp and paper industry depends on, and promotes, sustainable forest management to provide a reliable supply of wood fibres, the key raw material for its products. Well-managed forests bring multiple benefits: services and biodiversity. Europe's forests, from where the region's paper fibres, have been growing by an area equivalent to 1,930 football pitches every day. 7 or 8% of the world's forests, thanks in part to the support of the pulp and paper industry.
 In Europe, wood comes from sustainably managed forests where the cycle of planting, growing and logging is carefully controlled.
 Cellulose fibres is the primary raw material for paper making. Of the fibre used by the European pulp and paper industry, 45% comes from virgin wood fibre and 55% from paper for recycling.
 In principle, cellulose fibre can be obtained from almost any plant and is a renewable resource. However, the sector is not suitable for such as agricultural waste, because of its in perspective, water consumption and energy requirements.
 Commercially, the process is good if provided sufficient, vulnerable forest conversion to land.
 Well-managed forests directly support population and agriculture. The energy, natural resources and biodiversity are also important.
 The total impact on the world's forests is different from other agricultural products of mass production and food in crops.



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 est composée de cellulose que nous utilisons au quotidien, comme les cahiers et les cahiers en carton, ou encore des produits d'hygiène personnelle, mais certains produits utilisent des fibres de cellulose d'origines alternatives.
 En principe, presque toutes les fibres végétales peuvent être utilisées pour fabriquer du papier, mais les caractéristiques et peu sont commercialement viables.
 La paille était autrefois largement utilisée, mais elle est traditionnellement souffrante d'inconvénients, tels qu'une faible capacité à retenir l'eau pendant la fabrication du papier et un potentiel de pollution plus important, associé 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 à la déchirure, mais à un coût plus élevé.
 Le bambou présente des caractéristiques techniques similaires à celles de la pâte de bois et est commercialement viable dans certaines régions du monde, notamment en Asie, bien qu'un quart des récoltes soient destinées à l'industrie textile.
 La bagasse, le résidu fibreux obtenu après l'extraction du sucre de la canne à sucre, se comporte comme la paille, mais est plus difficile à traiter.
 La betterave sucrière présenterait un certain potentiel, notamment en raison de sa faible teneur en lignine (la «colla» qui lie les fibres entre elles, mais qui est l'inconvénient est d'altérer les propriétés du papier). L'utilisation de la betterave ne s'est ainsi pas développée à l'échelle industrielle.
 Il est important de noter qu'une fibre alternative n'est commercialement viable que si elle présente des avantages économiques, le rapport entre les fibres de substitution et la pâte de bois est relativement faible, généralement jusqu'à 20%.



Eine natürliche Entscheidung - Papiertragetaschen
Die Fakten
 Täglich werden wir mit den wachsenden Auswirkungen unserer Plastiknutzung konfrontiert, u.a. auch durch die steigende Zahl von Plastikmüll und -partikeln, die in den Weltmeeren treiben. Die EU-Mitgliedsstaaten haben darauf mit Verboten, Geldstrafen und Initiativen zur Reduzierung von Plastik reagiert. Während eine allgemeine Verringerung unnötiger Plastikabfälle einen wertvollen Beitrag für eine zirkuläre und weniger verschwendische Abfallwirtschaft leistet, stellen Verpackungsmaterialien aus Papier aufgrund ihrer natürlichen und erneuerbaren Eigenschaften eine attraktive und praktikable Alternative dar. Und: Zahlreiche Studien belegen die Vorteile von Papiertüten gegenüber Kunststofftragetaschen.
 Besorgnis in der Bevölkerung über den enormen Plastikverbrauch
 In den letzten Jahren sind die Auswirkungen von Einwegverpackungen und Kunststoffen auf die Umwelt immer deutlicher geworden. Stimmen mit der Befürchtung, dass vergleichsweise wenig Kunststoffverpackungen recycelt werden (42 % EU-Durchschnitt 2016) und nur 14 % weltweit¹) und dass sie bei unverantwortlicher Nutzung einen maßgeblichen Anteil an der Verschmutzung der Weltmeere haben, werden laut. Umweltschützer zeigen sich besorgt und befürchten, dass bis zum Jahr 2050 mehr Plastik im Meer sein könnte als Fische schwimmen.²
 Laut Marine Litter Watch stehen Einkaufstüten an 7. Stelle der Abfallprodukte, die am häufigsten an Europas Stränden zu finden sind.³ Zwischen 2015 und 2019 wurden 3 % des angespülten Materials als Plastiktüten und 0,2 % als Papiertragetaschen identifiziert. Und das obwohl der Anteil von Plastiktüten abgenommen hat, da die europäischen Staaten gehandelt und den Verbrauch eingeschränkt haben.⁴

EU-Staaten müssen den Verbrauch von Plastiktüten drastisch einschränken
 Im Jahr 2015 führte die EU Rechtsvorschriften für Plastiktüten ein, mit dem Ziel, den durchschnittlichen Verbrauch pro Person von rund 200 Tüten pro Jahr zu senken. Bis Ende 2019 soll der Pro-Kopf-Verbrauch auf 90 und bis 2025 auf 40 Plastiktüten pro Person fallen.⁵
 Irland erhebt seit 2002 eine Steuer auf Einweg-Plastiktüten und hat so den Verbrauch um 95 % reduziert.⁶ Andere Länder haben seitdem ebenfalls Maßnahmen ergriffen, um den Verbrauch von Plastiktüten zu senken, darunter Teilverbote wie in Frankreich und Belgien (in Österreich liegt ein Gesetzeseinwurf dazu vor), Geldstrafen (in Dänemark, Estland, den Niederlanden, Spanien und dem Vereinigten Königreich) und freiwillige Verpflichtungen (Deutschland und Finnland).⁷ Diese Maßnahmen haben Verbraucher darin bestärkt, wiederverwendbare Einkaufstüten zu benutzen und einige Einzelhändler dazu bewegt, Alternativen zu traditionellem, nicht biologisch abbaubarem Kunststoff zu anbieten.
 Papiertüten als attraktive Alternative
 Der Rohstoff für Papiertüten – Holz – ist eine erneuerbare und nachhaltige Ressource. Zwischen 2005 und 2020 wuchsen die europäischen Wälder um eine Fläche so groß wie die Schwedens, was 1.500 Fußballfeldern pro Tag entspricht.⁸
 Die Recyclingquote für Papier- und Kartonverpackungen in der EU beträgt 85 % (58 % weltweit⁹). Selbst wenn eine Papiertüte unverantwortlich entsorgt wird, hat diese aufgrund ihrer natürlichen kompostierbaren Eigenschaften eine deutlich geringere Auswirkung auf die Umwelt als eine Plastiktüte.

“Fast 80 % der Abfälle im Meer stammen vom Land. Das meiste davon ist Kunststoff. Inzwischen finden wir Plastik in den Mägen von Seevögeln und gestrandeten Walen. Es ist offensichtlich: Wir müssen handeln.”
 Europäischer Umweltkommissar Karimou Vella, November 2017.



Factographics + mini videos

- 20+ Factographics on the sustainability and attractiveness of paper and print media
- 20 Mini Videos
- Ideal for social media



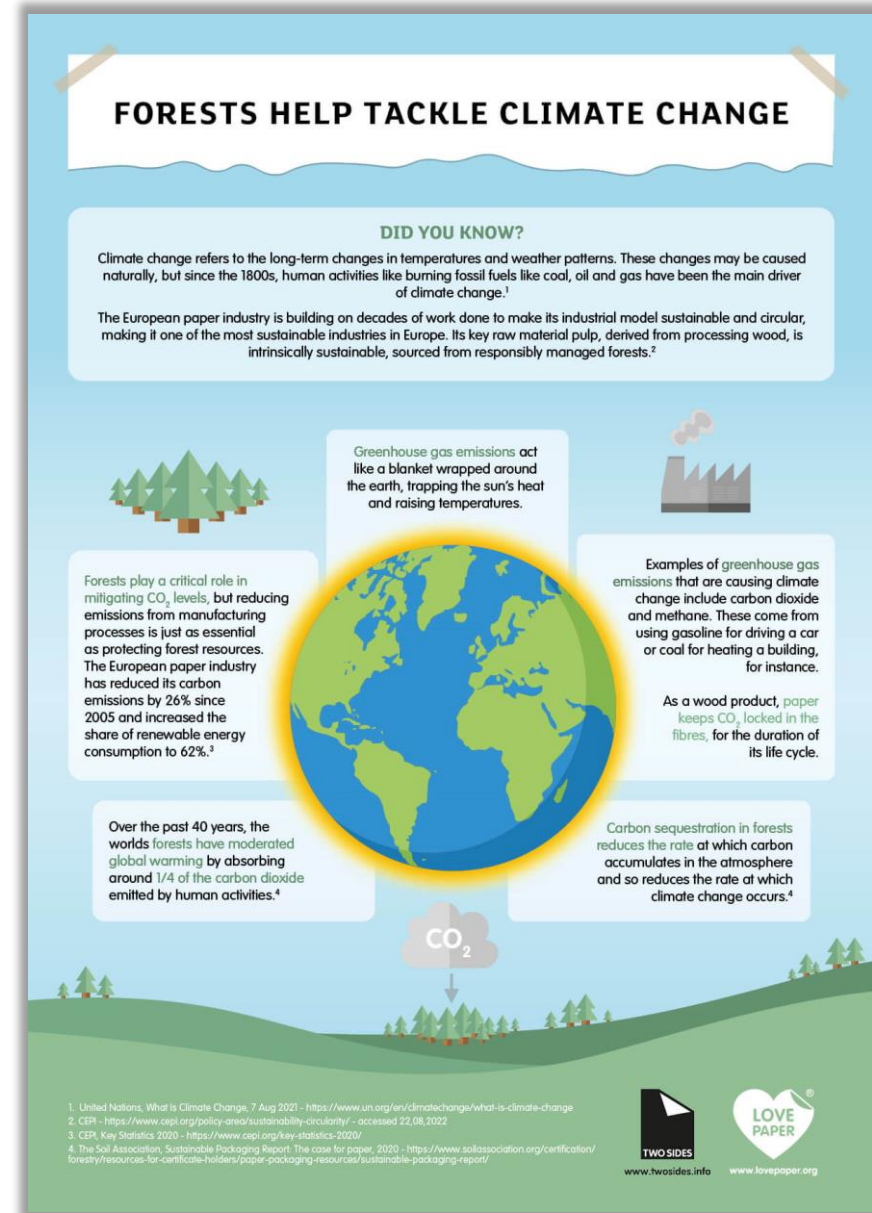
NEW Infographic

- **Forests Help To Tackle Climate Change**

Simple to refer to and easier to digest

- Plan for more infographics on other important subjects for the industry

- Paper & The Circular Economy
- Paper & Biodiversity
- Paper Packaging, The Natural Choice
- Climate Change and Net Zero



Expanding our reach.....

- Portuguese language website, Myths and Facts and key facts sheets in development
- Mýty a Fakta - Working with Czech printing association to publish a Czech version
- New discussions with ASPAPEL to create Spanish materials
- Recognised that materials in Polish would be helpful



Personalising Two Sides Tools

Personalised for members and supporters

Between 2005 and 2020, European forests grew by 58,390km². That is an area larger than Switzerland!

Source: FAO data, 2005-2020.

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

BURGO GROUP

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

Norske Skog

The recycling rate for paper and cardboard packaging in the EU is 85% (58% globally).

Source: Eurostat, 2016
Ellen MacArthur Foundation, The New Plastics Economy: Rethinking the Future of Plastics & Catalysing Action, 2017

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

Norske Skog

Paper Production and Sustainable Forests

The Facts

The pulp and paper industry depends on wood, the key raw material for its products. European forests and landfills, Europe's forests have been growing for an area equal to 1900 football pitches in 2020.

In Europe, wood comes from sustainable sources within the cycle of planting, growing and logging.

Cellulose fibre is the primary raw material for 90% of the fibre used by the European pulp and paper industry. 45% comes from virgin wood fibre and 55% is recycled.

In principle, cellulose fibre can be extracted from almost any wood fibre. However, wood is the best source of fibre because it is renewable and provides a wide range of properties, including low cost and performance.

Continued investment in growing wood provides good forest management. Forestry provides jobs for workers, wood and its various uses for local logging and its conversion to biofuel.

Well-managed forests bring multiple benefits:

- Provide directly or indirectly 25% of the world's population and can also have beneficial indirect effects. The primary wood products are sawlog, industrial timber, pulp and other wood products, which are used in a wide range of products, including construction and packaging materials.
- The real majority of forests worldwide is woodlands, which are often used for other purposes. In some areas, 25% of the world's population lives in woodlands.

Source: Eurostat, 2016
Ellen MacArthur Foundation, The New Plastics Economy: Rethinking the Future of Plastics & Catalysing Action, 2017

Paper Recovery and Recycling

The Facts

In Europe, 73% of paper consumption was recycled. Paper is one of the most recycled products. The paper recycling process starts with post-consumed paper products. It can be used to produce new paper and to produce other products. The paper and cardboard industry (90%) has a recycling rate of 73%.

There is increasing concern about the overuse of plastic bags and particularly their contribution to marine litter. EU countries have called for introducing bans, charges and other initiatives to limit their use. While a general reduction in unnecessary packaging will be a valuable contribution to a circular and less wasteful economy, paper bags, because of their natural and renewable fibre base, present an effective and practical alternative. Studies show that they can be the natural and environmental alternative to plastic and textile bags.

EU countries must drastically reduce consumption of lightweight plastic bags.

In 2015, the EU introduced a general ban on single-use plastic bags. However, the ban was not applied to paper bags. Paper bags are made from a renewable and biodegradable material. They are also made from recycled paper and are therefore a more sustainable alternative to plastic and textile bags.

Source: Eurostat, 2016
Ellen MacArthur Foundation, The New Plastics Economy: Rethinking the Future of Plastics & Catalysing Action, 2017

Paper Bags, The Natural Choice

The Facts

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Source: Eurostat, 2016
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Print & Papier Mythen & Fakten

mondi

Print and Paper Recycling have a great environmental story to tell

TWO SIDES

Tryck och Papper Myter och Fakta

Canon

Print and Paper Myths & Facts

BURGO GROUP

Print and Paper Recycling have a great environmental story to tell

TWO SIDES

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

European Environmental Agency (EEA), 2020

Discover the facts about paper www.twosides.info

BURGO GROUP

Did You Know

Discover the facts about paper www.twosides.info

TWO SIDES

Trend Tracker 2023

Trend Tracker Survey

- Biennial Research - Next to be published April 2023
- Will continue to explore and understand changing consumer preferences, perceptions, and attitudes towards print, paper and paper packaging
 - Environmental Perceptions
 - Reading Habits
 - Packaging Preferences
 - Tissue – *Funded by Tissue Sector*
- Essential Two Sides has relevant consumer research

Paper's Place In A Post Pandemic World

The Two Sides Trend Tracker survey examines consumer attitudes towards print, paper, p

Der Platz von Papier in einer Welt nach der Pandemie

Unser Two Sides Trend Tracker untersucht die Einstellung der Verbraucher zu Druck-, Zellstoff- und Papierprodukten sowie Papierverpackungen.

La place du papier la crise sanitaire

Une analyse des perceptions et du comportement des consommateurs à l'égard et des produits d'hygiène



Constats européens

Diario per il nostro futuro. La carta nel mondo post Covid -19

Trend Tracker. Un'indagine sulle preferenze e sugli atteggiamenti dei consumatori verso la stampa, la carta, gli imballaggi in carta e i prodotti per usi igienici e sanitari



Print- und
produkte
erzählen
(Umwelt-)
schichten
TWO SIDES
www.de.twsides.info

Trend Tracker 2023

- Multi- Language report for **Europe** will be published in May 2023
- Webinar presentation and detailed results available to our members and industry stakeholders - including, for the wider regions of North America, South America and South Africa
- Will provide press releases and news content for Two Sides over 6 months

Paper's Place In A Post Pandemic World

The Two Sides Trend Tracker survey examines consumer attitudes towards print, paper, p...

Der Platz von Papier in einer Welt nach der Pandemie

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Print- und
produkte
erzählen
ökoartigen
Umwelt-
schichten
TWO SIDES
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Packaging

Packaging Development

Despite paper packaging being seen as part of the environmental solution to plastics, there will be a growing need to tell the sustainable story

Two Sides objectives;

- Grow our activity in packaging
- Tackle misleading statements about packaging
- Develop Love Paper with packaging companies, brands and retailers to inform consumers on the sustainable nature of our products and their packaging choices
- Develop relevant facts, resources and messages for the industry to use
- Grow our membership and support from the packaging industry

Communications

Communications Strategy

Business Professionals Focus

11 Language websites
190,000 visitors p.a.
Regular e-newsletters
Members resource area
Active Social Media
Twitter
Facebook
LinkedIn



www.twosides.info



www.lovepaper.org



Consumers Focus

7 language websites
40,000 visitors p.a.
Regular e-newsletters
Active Social Media
Twitter
Facebook
Instagram

230,000 Website Visitors
19 million Social Media Reach
(annually)



Two Sides and Love Paper Social Media to reach 19 million Europeans



**Love Paper 2022
Target Reach
8,000,000**

**End Q3
9,640,000
121%**

**Two Sides 2022
Target Reach
4,400,000**

**End Q3
4,750,000
108%**

Main channels used	
LinkedIn	
Twitter	
Facebook	
Google	

Die europäische Papierrecyclingrate liegt bei 72% und macht aus Europa den Spitzenreiter im weltweiten Vergleich.

Quelle: CEPI, 2019.

Entdecken Sie die Fakten über Papier
www.de.lovepaper.org

[HTTPS://DE.LOVEPAPER.ORG/PAPIER-FAKTEN/](https://de.lovepaper.org/papier-fakten/)
Papier-(F)Akten | Love Paper DE
Europäische Wälder, die für die Herstellung von H...

Mehr dazu

2022 - Improve measurement and reporting



Campaign Update

- Regular Campaign Updates inform members and stakeholders
- German and English
- Easy to read 4page A4 format
- EU version twice a year

Anti-Greenwash

Wir stoppen irreführende Anti-Print-Aussagen!

In Zeitraum von April bis September dieses Jahres hat unsere Anti-Greenwash-Kampagne 44 Unternehmen erfolgreich dazu gebracht, ihre Marketing-Claims zu ändern und irreführende Aussagen in Bezug auf Druck und Papier zu entfernen.

Berechnen wie "Wachstums" Sie zur E-Rechnung und halten Sie der Umwelt", die implizieren, dass die Digitalisierung ausschließlich Vorteile für hat, sind für unsere Branche äußerst schädlich. Wir haben hier daran, sicherzustellen, dass Marken die Umweltauswirkungen schriftlicher Medien verstehen bevor sie Aussagen zu Druck, Papier und Papiergepackungen treffen.

Ein Beispiel dafür war unser anderem E.ON in Großbritannien. Nachdem das Unternehmen in einem Schreiben von Two Sides darauf hingewiesen wurde, änderte es schnell die Botschaften auf der Website und in der App.

Love Paper

Zeit zu handeln – Seien Sie dabei

Stakeholder von Two Sides haben die Möglichkeit, das LovePaperLogo und die damit verbundenen Werte zu verwenden. Es ist eine großartige Möglichkeit, Ihre Nachhaltigkeitsziele zu unterstützen und zu ergänzen. Das Logo kann von Unternehmen, deren Kunden und Ihnen selbst auf papierbasierter Kommunikation und Verpackungen verwendet werden, um deren nachhaltige und ethische Eigenschaften zu verdeutlichen.

Kontaktieren Sie uns noch heute, um mehr darüber zu erfahren und sich für die Nutzung des LovePaperLogos zu registrieren.

Tel: 040 / 41 40 63 9-11
Email: info@lovepaper.org

www.de.lovepaper.org

Kampagnenreichweite

Das Bewusstsein für die Love-Paper-Kampagne wächst stetig. Seit April haben wir die Love-Paper-Kampagne in Italien, Deutschland und Skandinavien erfolgreich gelancet. Wir verzeichnen kontinuierlich mehr Besucher auf unserer Website lovepaper.org. Seit April zählen wir 15.000 Besucher und 25.000 Seitenaufrufe.

Kommunikation

Wir verbreiten die nachhaltige Geschichte von Print, Papier und papierbasierten Verpackungen

Von April bis September haben wir weiterhin Content auf den Websites von Two Sides und Love Paper geteilt und so unsere Botschaften noch weiter verbreitet. Die Besucherzahlen sind auch in diesem Zeitraum weiter gestiegen und seit September 2019 konnten wir die Zahl unserer Besucher und der Seitenaufrufe mehr als verdoppeln.

Website Performance Europa – April – September

Page Views (Kontext)	129.076	20.919
UNIQUE USER	79.268	16.841

Two Sides Love Paper

Love Paper Europa

Die LovePaper-Kampagne wurde im vergangenen September in Großbritannien neu aufgelegt. Seitdem haben wir die Reichweite der Kampagne auf weitere Staaten Europas ausgeweitet, u.a. in Deutschland (alt) und Italien (September).

Beide Länder bieten auch The Paper Chain / Die Papier-Bewegung, einen interaktiven Blog, der die Rolle von Druckerkonzernen, Papier und Papierverpackungen im kreislauf Prozess und in der Bildung als wichtiges Kommunikationsmedium thematisiert.

Auch "Love Paper Creations" werden in beiden Ländern angeboten. Eine Reihe von Arbeitsblättern für Kinder und Familien, die dazu ermutigen, sich eine kleine Auswahl von digitalen Geräten und Aktivitäten zu gönnen und Spaß mit Papier zu haben.

29
VERIFIED CHECKED NEWSLETTER

111
NEUE BETRÄGE AUF DER WEBSITE

5.500
FOLLOWER AUF SOCIAL MEDIA

80.000
REICHWEITE

44
GREENWASH-ERFOLGE

28.000
NEWSLETTER-ABONNIERTEN

Two Sides Kampagnen-Update

Two Sides Campaign Update

Europe, 2021 Review

Jonathan Tame
Managing Director,
Two Sides Europe

As the world is returning to some normality after a couple years of uncertainty, it's clear that sustainability is forefront for consumers, brands and businesses.

We work hard to tell the great environmental story of print, paper and paper-based packaging and, despite restrictions to work and travel, sustainability remains a key talking point. In fact, our Anti-Greenwash campaign is proving more important than ever as, with an economy under pressure, organisations, to save costs, continue to urge their customers to switch from paper to digital communications.

In Europe, we estimate our Anti-Greenwash campaign has prevented Greenwashing by major banks and other service providers (messages such as "Go Green, Go Paperless", and "Save Paper, Save Trees"), being seen over 590 million times a year. Our research shows that €337 million of value for paper, print and mail is at risk if Greenwash is left unchallenged.

To improve consumer perceptions of our products, our growing Love Paper campaign across Europe last year had more than 1,200 adverts in national newspapers and magazines, reaching more than 20 million consumers every month. We are telling more consumers than ever the sustainable story of our products and this will continue to be an important focus this year.

You'll find more details about our results and activity during 2021 over the next few pages.

Europe Headlines

- 590 Million Customers Of Service Providers Prevented From Seeing Greenwash
- 1,925 Major Organisations Investigated For Greenwashing
- 1,140 Organisations Found To Be Greenwashing To Date
- 520 Organisations Greenwashing Successfully Challenged To Date
- 188,500 Website Sessions Annually
- 1,200 Love Paper Adverts in Newspapers And Magazines in 2021
- 400 Content Items Added To The Website In 2021
- 11,850 Social Media Followers

Print, Paper and Paper Packaging have a great environmental story to tell

www.twosides.info www.lovepaper.org

Unsere Ergebnisse in Zahlen

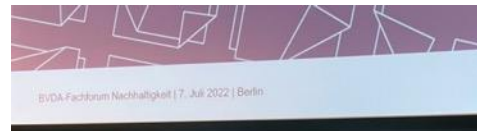
- 650 Millionen Kunden von Dienstleistern haben keine Greenwashing-Aussagen zu Gesicht bekommen
- 1493 Unternehmen und ihre Claims werden bis heute im Rahmen unserer Greenwashing-Aktivitäten analysiert
- 839 Unternehmen, die Greenwashing betreiben und die daraufhin kontaktiert wurden
- 428 Erfolgreiche Korrekturen der Greenwashing-Claims
- 200.000 Website-Besuche pro Jahr
- 646 Love Paper-Anzeigen in Zeitungen (weltweit im Jahr 2020)
- 470 Neue Inhalte auf der Website im Jahr 2020
- 30 Two Sides ist inzwischen in 30 Ländern vertreten

Print- und Papierprodukte erzählen großartigen (Umwelt-) Geschichten

www.twosides.info www.lovepaper.org

TWO SIDES

Can we help with Events & Training



www.twosides.info



www.lovepaper.org



Euro-Graph Board Meeting – 22nd November 2022

Actions following Euro-Graph changes

- Establish funding intentions of remaining members
- Develop marketing and wider contacts within all Euro-Graph member companies
- Provide regular update on Two Sides activities by Email. Present an update at Euro-Graph General Assembly meetings
- Ask Euro-Graph members to assist with packaging divisions' support and upstream; pulp/equipment etc., participation
- Review stakeholder working groups
 - Board
 - Marketing Steering Group
 - Sustainability Steering Group

We Are An Industry Under The Spotlight

- Leading NGOs are increasingly focused upon forest use and CO2 emissions
- Our industry's activities are being scrutinised
- The plastics industry is hitting back
- Communications are being scrutinised

Our Industry has been awarded this year's Swedish Greenwash prize!



Greenwashing har uppmärksammats stort av både varumärken och konsumenter det senaste året. Nu tilldelas kampanjen Svenska Skogen årets "Svenska Greenwashpriset": "De gröna orden stämmer inte överens med handlingarna."

(Greenwashing has received a lot of attention from both brands and consumers in the past year. Now the campaign Svenska Skogen is awarded this year's "Swedish Greenwash prize": "The green words do not match the actions.")

Euro-Graph Board Meeting – 22nd November 2022

As one of the largest industrial sectors in the world, the pulp and paper industry has an enormous influence on global forests. This sector, which makes products such as office and catalog paper, glossy paper, tissue and paper-based packaging, accounts for 13–15% of total wood consumption and uses between 33–40% of all industrial wood traded globally. And the United States is the second-largest paper producer and consumer country in the world.

The forest practices associated with some pulp and paper operations have had devastating impacts on some of the world's most ecologically important places and species. Unsustainable pulp and paper operations have contributed to conversion of high conservation value forests, illegal harvesting, human rights and social conflicts, and irresponsible plantation development. Given the global nature of the pulp and paper sector, paper from these unsustainable sources can reach North American markets.

33–40%

The pulp and paper industry, which makes products such as office and catalog paper, glossy paper, tissue and paper-based packaging, uses between 33–40% of all industrial wood traded globally.



More Deforestation (9 Billion Trees) – The Price of Plastic Paranoia

Heinz, Budweiser, Nestle, Coca Cola, Iceland, Asda, etc, etc. Every time I read of some major brand or supermarket replacing 'Single Use Plastic' with paper, board, or compostable alternatives, I think of my 2 year old granddaughter Jess (her photo) and the devastation these companies are causing to our planet, in the name of 'Environmental Progress'



paper / on the rocks

The paper industry is one of the biggest polluters in the world. Grinding down forests and swallowing unimaginable amounts of water, oh and don't forget the tons of CO² emissions added to the mix. Needless to say it is in all our best interest to explore paper alternatives. Luckily, great alternatives are up for grabs.



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 any 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 230,000 visitors to Two Sides websites and more than 1.5 million electronic newsletters are distributed
- Love Paper campaign European advertisements reach over 240 million people a year, worth an estimated €3.5 million advertising
- Social Media reaches 19 million European Consumers and Business Professionals every year
- Telling the great sustainability story of print and paper