

EMPHA General Assembly #16

12 June 2025
Segovia, Spain

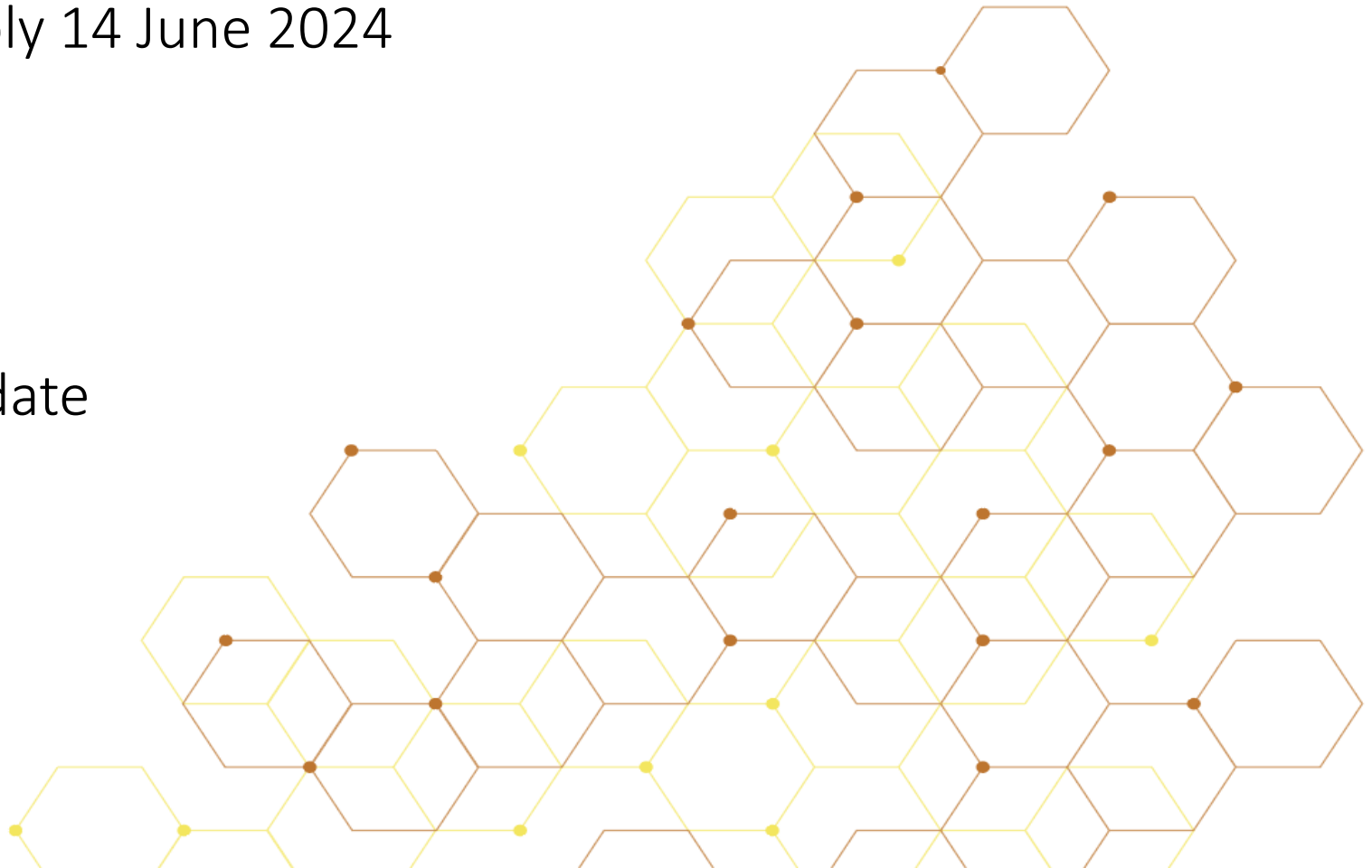


European Manufacturers Paper Honeycomb Association



Agenda

1. Opening
2. EMPHA Antitrust reminder
3. Minutes General Assembly 14 June 2024
4. President's Message
5. EMPHA Marketing
6. Finance
7. EMPHA Membership update
8. Round Table
9. Next EMPHA meeting
10. AOB



Agenda

1. Opening
2. EMPHA Antitrust reminder



European Manufacturers Paper Honeycomb Association



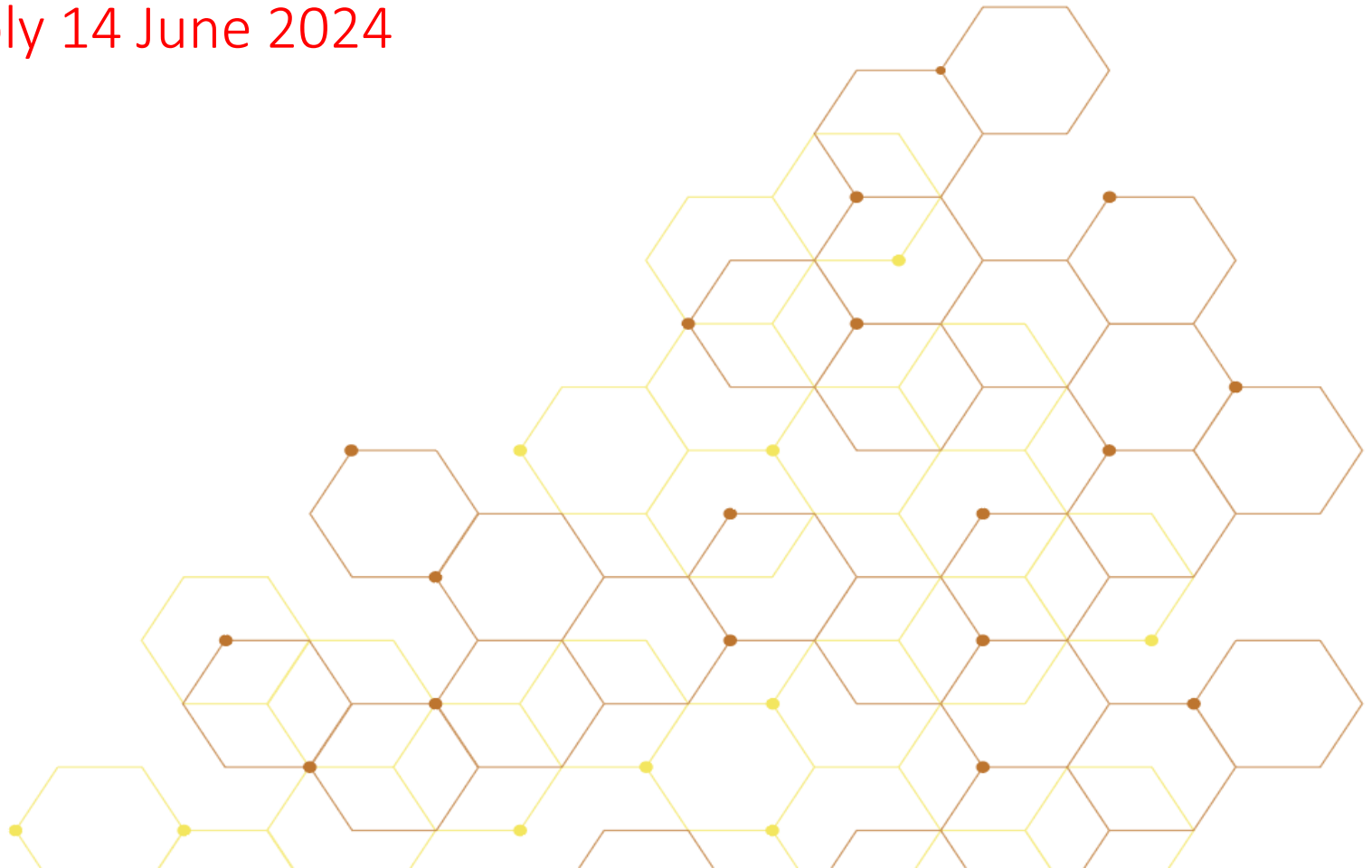
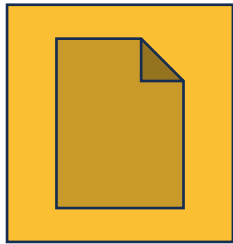
EMPHA Antitrust Reminder

- EMPHA is committed to compliance with the antitrust rules that aim to achieve free competition and fair terms for all business transactions.
- The participants in this meeting hereby acknowledge that no issue will be discussed that will violate antitrust rules and that during this meeting and the breaks these rules shall be respected under all circumstances.
- No information will be shared that cannot be found in the public domain



Agenda

1. Opening
2. EMPHA Antitrust reminder
3. Minutes General Assembly 14 June 2024



PRESIDENTS REPORT

- BOARD MEETINGS
 - 6 Board Meetings (Sept, Oct, Dec, Feb, May, June)
 - Open Board position
- GA 2022 TASKS
 - Marketing & Social Media Campaign
 - Life Cycle Analysis
 - Increase Membership
 - Lobbying, Legislation, Technical Issues
 - CITPA
 - TWOSIDES



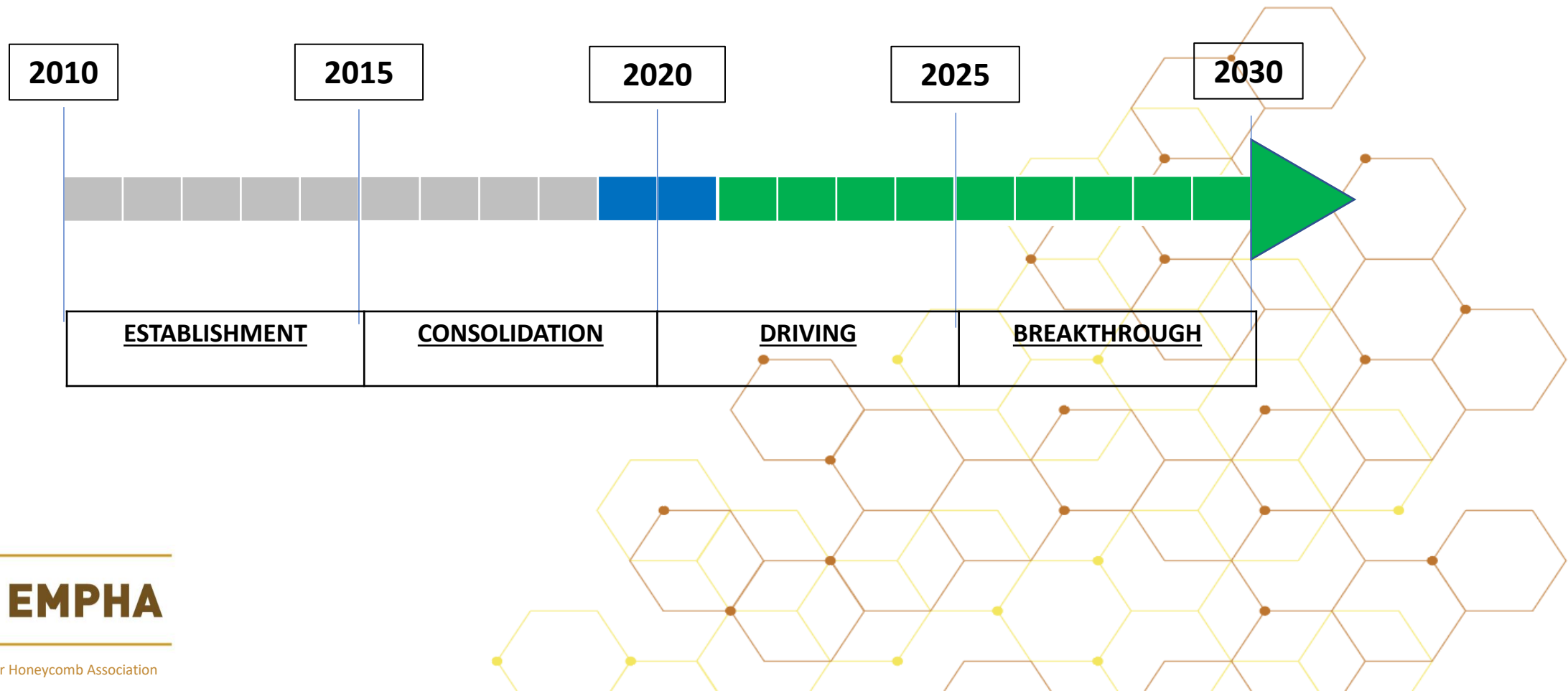
President's Message



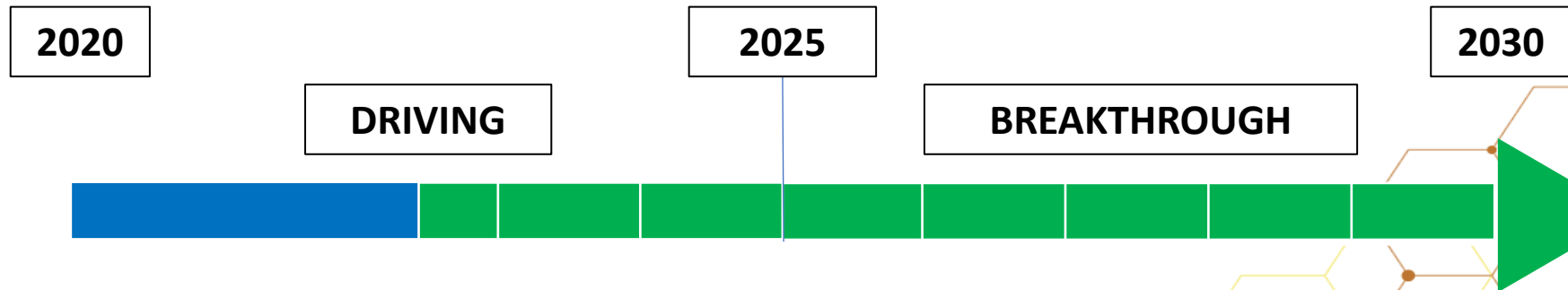
European Manufacturers Paper Honeycomb Association



EMPHA LOOKING BACK & GOING FORWARD



EMPHA GOING FORWARD



ENTREPRENEURIAL MEMBERSHIP

INNOVATIVE TEAMS & INDIVIDUALS

SUSTAINABILITY AS A KEY INDUSTRY DRIVER FOR GROWTH: ALL
SECTORS

WE HAVE AN INDUSTRY MODEL TO FOLLOW



PRESIDENTS MESSAGE 2020

WE HAVE COME TO A GOOD PLACE
WITH A BETTER PLACE TO GO TO

LETS KEEP GOING THERE TOGETHER

EMPHA Board Development

- President: Tony Moscrop
- Board member: Gilles Latil
- Vacancy from Ram Peleg
- New Board members

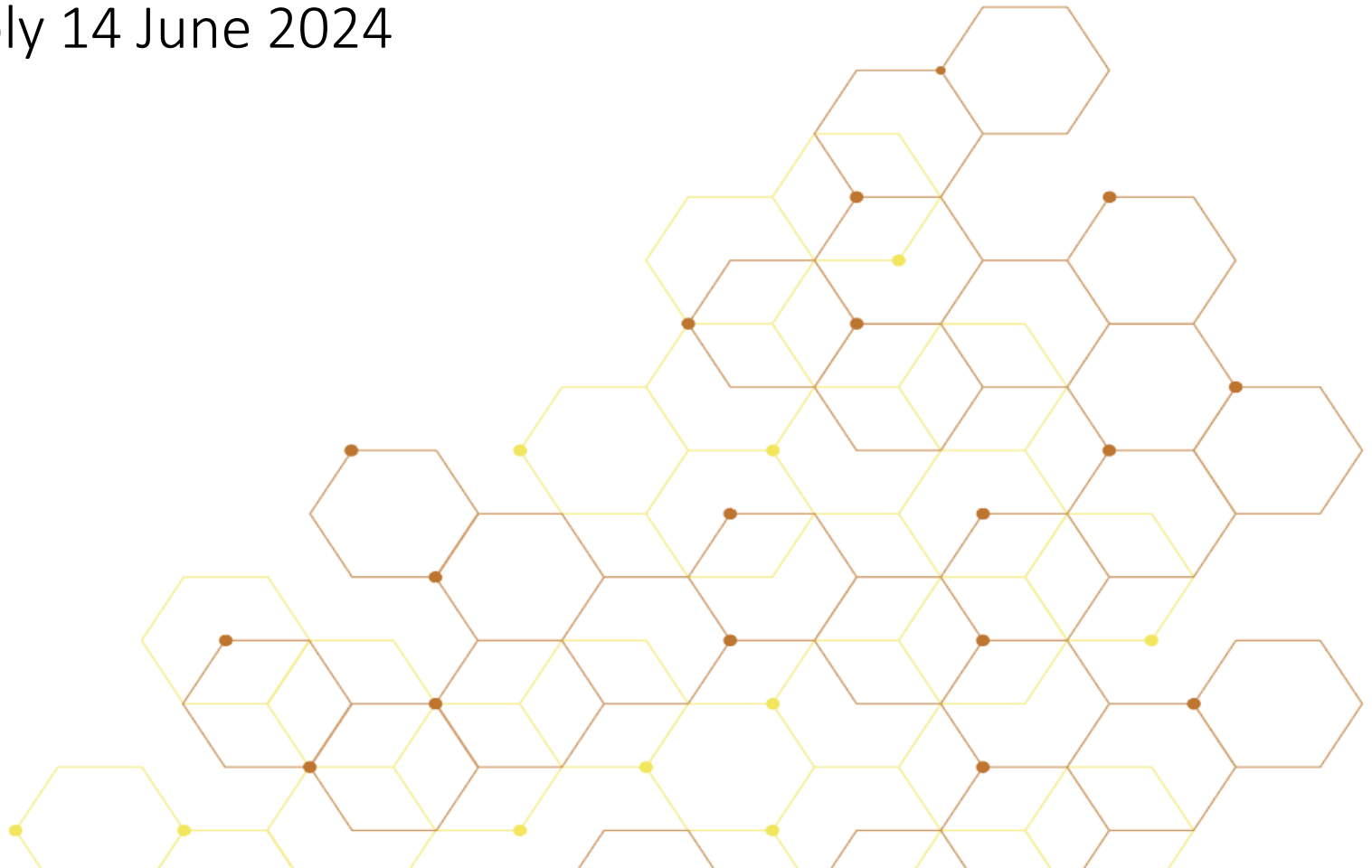


To help Ram follow the Camino Del Norte route and bring us back a trail



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5. EMPHA Marketing





EMPHA DIGITAL ENGAGEMENT REPORT



A Selection of LinkedIn Campaigns over the last 12 months



 YamatonPaper



Rethinking Materials:
Paper Honeycomb is Shaping the
Future of Furniture.



**100% Zero-Waste Packaging –
The Future is Here!**



The Next 5 Years of Paper Honeycomb:

Trends That Matter.

As sustainability shifts from buzzword to business imperative, paper honeycomb (PH) is gaining serious traction – and it's only just getting started.



Still using expanded
polystyrene for packaging?
It's time to rethink.



Marketing Strategy Overview

Key goals:

- Grow audience.
- Increase engagement.
- Share valuable content.
- Represent members fairly and effectively.
- Educate end user markets and encourage transition from EPS to PH.
- Support members LI Posts

Tactics

- Weekly content sent to the Chairman of EMPHA & the secretariat for approval.
- Content includes member highlights, sustainability news, market trends and examples of innovation.
- Content boosted by use of hashtags, tagging, keywords and innovative visuals.
- Aim is to lead with topical industry content, created with integrity.



Paper Honeycomb: The Quiet Giant of Sustainable Innovation.

Did you know that paper honeycomb structures can be up to 95% lighter than solid materials, yet still deliver impressive strength and rigidity?



Lightweight Champion in Heavy-Duty Protection: Paper Honeycomb Packaging



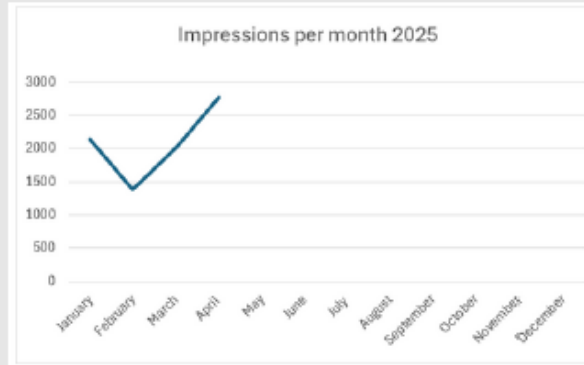
Earth Day

Today is a reminder that sustainability isn't a trend — it's a responsibility. As a collective of innovators, manufacturers, and packaging pioneers, we know that the choices we make today shape the future of our planet.

LinkedIn Performance.

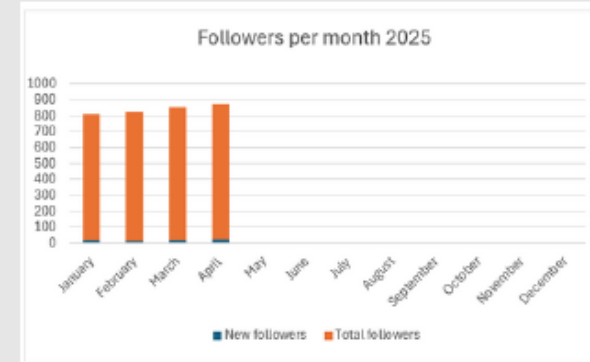
Impression rate

Between June 2024 and June 2025 LI impression total
31,942



Followers growth

627 in June 24
892 in June 25
an increase of 281 followers



Engagement Rate:

In the first quarter of 2025, we averaged a 7.20% open rate on LinkedIn for our posts, which is classed as exceptional by LinkedIn.

Statistics correct as of the 09/06/25

Top-performing posts - why they worked



🚀 ****2025 Trend Alert: Paper Honeycomb is the Future of Packaging!**** 🐝
As we move into 2025, sustainability is taking centre stage in the packaging industry—and ****paper honeycomb**** is leading the way! ?

Reached 582 impressions and 33 clicks, the post was timely, the start of 2025, everyone looks for inspiration and direction at the start of a year. Focus is mainly on content.

Simple styling



**Paper Honeycomb:
The Quiet Giant of Sustainable
Innovation.**

Did you know that paper honeycomb structures can be up to 95% lighter than solid materials, yet still deliver impressive strength and rigidity?

🚀 **Paper Honeycomb: The Quiet Giant of Sustainable Innovation** 🐝📺

Did you know that paper honeycomb structures can be up to 95% lighter than solid materials, yet still deliver impressive strength and rigidity? It's no wonder this material is quietly revolutionising industries across Europe.

At EMPHA, we represent the pioneers of paper honeycomb manufacturing – the thinkers, the doers, the innovators shaping the future of sustainable materials.

This post has reached 988 impressions and 40 clicks, this post is still generating lots of interests today, because of the innovative image, and the impactful statement.

LinkedIn Impact

Increased visibility for member companies across all of these end use sectors.

- PACKAGING AND CONTAINERS MANUFACTURING
- PAPER AND FOREST PRODUCT MANUFACTURING
- WHOLESALE PAPER PRODUCTS
- MACHINERY MANUFACTURING
- IT SERVICES AND IT CONSULTING
- PRINTING SERVICES
- MANUFACTURING
- SOFTWARE DEVELOPMENT
- CHEMICAL MANUFACTURING
- INDUSTRIAL MACHINERY MANUFACTURING
- METALWORKING MACHINERY MANUFACTURING
- TRANSPORTATION, LOGISTICS, SUPPLY CHAIN AND STORAGE
- ADVERTISING SERVICES
- CONSTRUCTION
- RETAIL
- WHOLESALE BUILDING MATERIALS
- NON-PROFIT ORGANIZATIONS
- FURNITURE AND HOME FURNISHINGS MANUFACTURING
- INTERNATIONAL TRADE AND DEVELOPMENT
- AUTOMATION MACHINERY MANUFACTURING
- DESIGN SERVICES
- FOOD AND BEVERAGE MANUFACTURING
- ENVIRONMENTAL SERVICES
- REAL ESTATE
- APPLIANCES, ELECTRICAL, AND ELECTRONICS MANUFACTURING
- MOTOR VEHICLE MANUFACTURING
- RETAIL APPAREL AND FASHION
- TRUCK TRANSPORTATION
- WHOLESALE
- STAFFING AND RECRUITING
- FARMING, RANCHING, FORESTRY
- OIL AND GAS
- AVIATION AND AEROSPACE COMPONENT MANUFACTURING
- ARTIFICIAL RUBBER AND SYNTHETIC FIBER MANUFACTURING
- RENEWABLE ENERGY EQUIPMENT MANUFACTURING
- FORMATION SERVICES
- FOOD AND BEVERAGE SERVICES
- INDUSTRY ASSOCIATIONS
- PLASTICS MANUFACTURING
- FOOD AND BEVERAGE RETAIL
- HEALTH AND HUMAN SERVICES
- OPERATIONS CONSULTING
- MOTOR VEHICLE PARTS MANUFACTURING
- MARITIME TRANSPORTATION
- WAREHOUSING AND STORAGE
- FREIGHT AND PACKAGE TRANSPORTATION
- OIL, GAS, AND MINING
- RETAIL OFFICE EQUIPMENT

What's Next?

Plans for:

- More video content on LinkedIn
- Member spotlight series (first series of members spotlights were in 2024)
- Member case studies
- More targeted e-shots (segmentation)
- Marketing committee (to be formed)

What we need from you

- More updates and stories from member companies
- Event photos, case studies, sustainability stories
- Willingness to re-share and engage online
- Suggestions/feedback would be very welcome

Why marketing matters

As the Paper Honeycomb industry continues to evolve, EMPHA's brand needs to stand out. As forward looking association that wishes to stand out, we want to demonstrate that the members have both shared goals and values, paving the way for a more sustainable future in Honeycomb packaging.

EMPHA's goals:

- visibility, influence, collaboration, innovation, education.

How LinkedIn and email marketing directly support these goals:

- Raises awareness of paper honeycomb.
- Positions EMPHA as a thought leader.
- Keeps members informed.
- Attracts new partners.

WHAT'S NEW: E-SHOTS STRATEGY OVERVIEW

Purpose:

- Keep members updated.
- Drive traffic to EMPHA content.
- Promote events, reports, industry news, new member activity.
- Frequency: [quarterly]
- Format: email
- Clean design, digestible information, prepared by packaging industry experts.
- Action buttons (e.g., "Read More", "Register Now").
- Register your email address with the secretariat to receive the latest e-shot.



The Future of Packaging: Why paper Honeycomb matters in a PPWR era.

Adapting to PPWR – A Win for Paper-Based Packaging.

As the debate over the EU's Packaging and Packaging Waste Regulation (PPWR) continues, the spotlight on plastics' environmental and health risks grows stronger. 2024 brought new evidence linking micro- and nano-plastics to significant health concerns, while 'chemicals of concern' in plastics face increasing scrutiny.

Amidst this shifting landscape, brand owners and retailers are already taking action. The move away from plastics is accelerating, with major brands adopting paper-based solutions - furniture manufacturers, logistics companies, and brand owners are all looking to replace plastic components within their packaging due to consumer pressure. - Paperisation is here!

While European policymakers debate reuse versus recycling, the market is clear: consumers are demanding sustainable alternatives, and businesses are responding to these demands. Amongst other paper packaging products, paper honeycomb packaging is well positioned to meet these needs - offering strength, recyclability, and a low-carbon footprint within an already efficient recycling infrastructure.

With PPWR evolving and likely taking years to fully implement, now is the time to champion paper-based innovations and pack formats. Stay ahead of the curve and reinforce your commitment to a circular economy.

Have you got your copy of the latest EMPHA Report? Are you focussing and investing in the right areas to maximise the potential for your Paper Honeycomb business?

Get in touch and see how your association can help you!



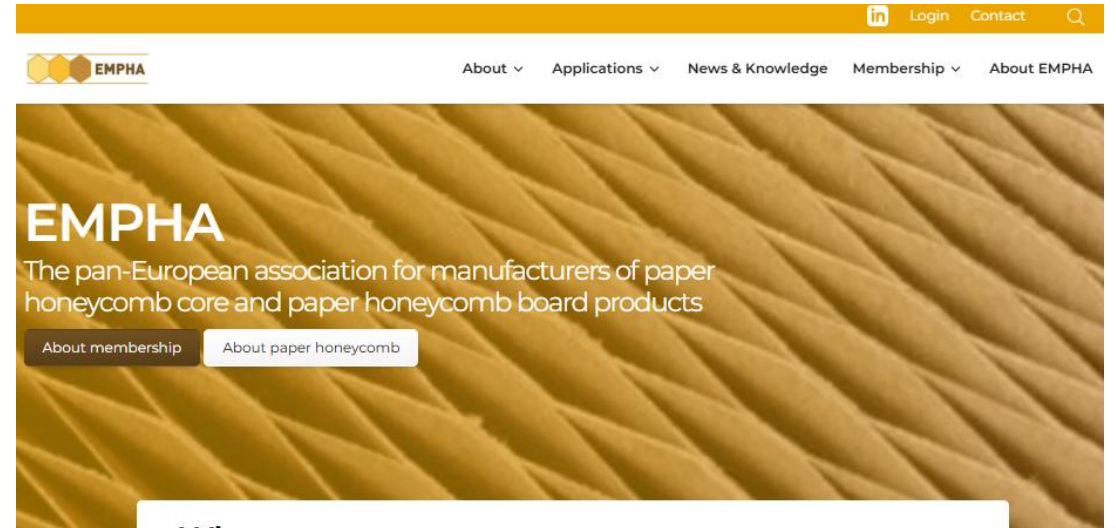
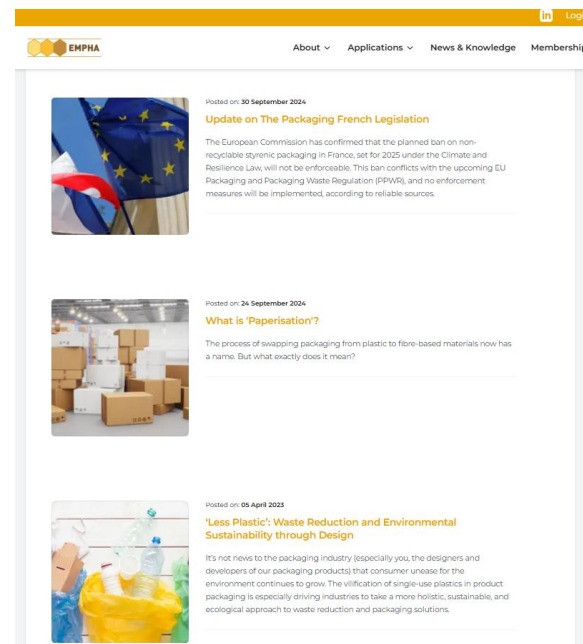
What else is new?

New layout EMPHA website!

- Request for new images that highlight innovation and great design in our industry



European Manufacturers Paper Honeycomb Association



Who we are

Founded in 2010, The European Manufacturers Paper Honeycomb Association (EMPHA) is the pan-European association for paper honeycomb manufacturers. We provide a central source for industry information and market insights, represent members' interests on legislative issues, establish industry standards, and offer a proactive forum for networking and knowledge sharing.

Why Honeycomb

Honeycomb is noted for its superior strength, rigidity and low aerial weight. Paper is a relatively low cost base material with low environmental impact. Paper honeycomb therefore is the most cost-effective core material available.

What is Honeycomb?

The paper honeycomb core is a series of hexagonal shaped cells, nested together creating a sheet when expanded with approximately 95% open space.

Now for Sale: European Paper Honeycomb Industry Report

The European Manufacturers Paper Honeycomb Association launched its first statistical report the 'European Paper Honeycomb Industry Report 2024' including future trends 2028.

Agenda

1. Opening and President's Message
2. EMPHA Antitrust reminder
3. Minutes General Assembly 16 June 2023
4. EMPHA Marketing
5. Finance
 - a. Report Audit Committee on financial outcome 2024



Financial Report 2024

INCOME

Entry fees
Membership fees (see right)
Associated members
Sponsors
Other income

Actual 2023 Euro	Budget 2024 Euro	Actual 2024 Euro
---------------------	---------------------	---------------------

8.750	0	5.000
37.500	39.000	39.000
2.750	1.500	8.500
	1.500	
1.500	19.500	20.500

TOTAL INCOME

50.500	61.500	73.000
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EXPENSES

Secretariat

Meeting costs (room rental)
Travel and stay secretariat
Telephone- fax costs secretariat
Office expenses
Legal cost / domicile
Bank costs
Provision bad debtors
Other

24.970	26.900	26.900
3.207	5.000	5.642
780	750	875
116	175	182
241	225	347
0	1.250	580
184	200	134
0	PM	0
653	725	752

Marketing expenses

16.564	34.050	39.747
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TOTAL EXPENSES

46.716	69.275	75.160
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RESULT

3.784	-7.775	-2.160
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Report of the Audit Committee

- Niels van Stijn – Axxor
- Lieuwe Kool – Honigel

➤ The Audit committee proposes to the members to discharge the EMPHA board for the financial outcome of 2024.

➤ Volunteers for Audit Committee 2026?



Report of the Audit Committee of EMPHA on the Year 2024

The undersigned, Mr. N. van Stijn and Mr. L. Kool confirms the following:

1. On 19 May 2025 we received the documents from Mrs E. Verbaarschot, who is responsible for the financial administration of EMPHA.
2. The sent documents are a draft of the annual account 2024. The statement of income and expenses 2024 with a loss of € 2.160 and the balance on 31 December 2024 with an equity of € 47.108, were the available (financial) documents.
3. We discussed the general principles underlying the use of such bookkeeping, accounts and accountability. We also had questions about some items appearing on the balance sheet and statement of income and expense which were answered to our satisfaction.
4. Given the above, we agree with the draft annual account report 2024 as shown to us. We therefore recommend the General Assembly to approve these documents and discharge the Board of EMPHA.

4612 June 2025

27-05-2025

Signature:

A blue ink signature of Mr. N. van Stijn, written over a dotted line.

Mr. N. van Stijn
Axxor Technology

A blue ink signature of Mr. L. Kool, written over a dotted line.

Mr. L. Kool
Honigel Nederland

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 - a. Report Audit Committee on financial outcome 2024
 - b. Budget 2026

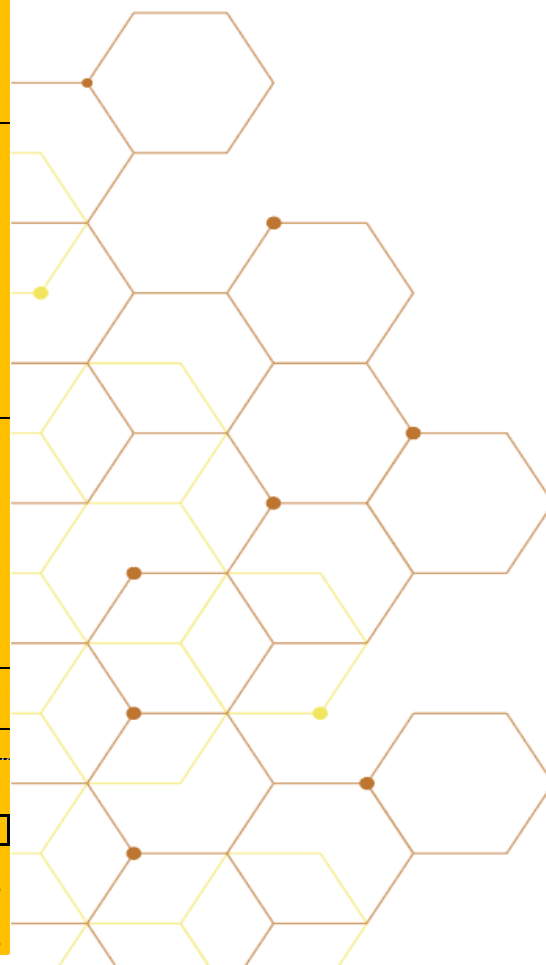


Budget 2026



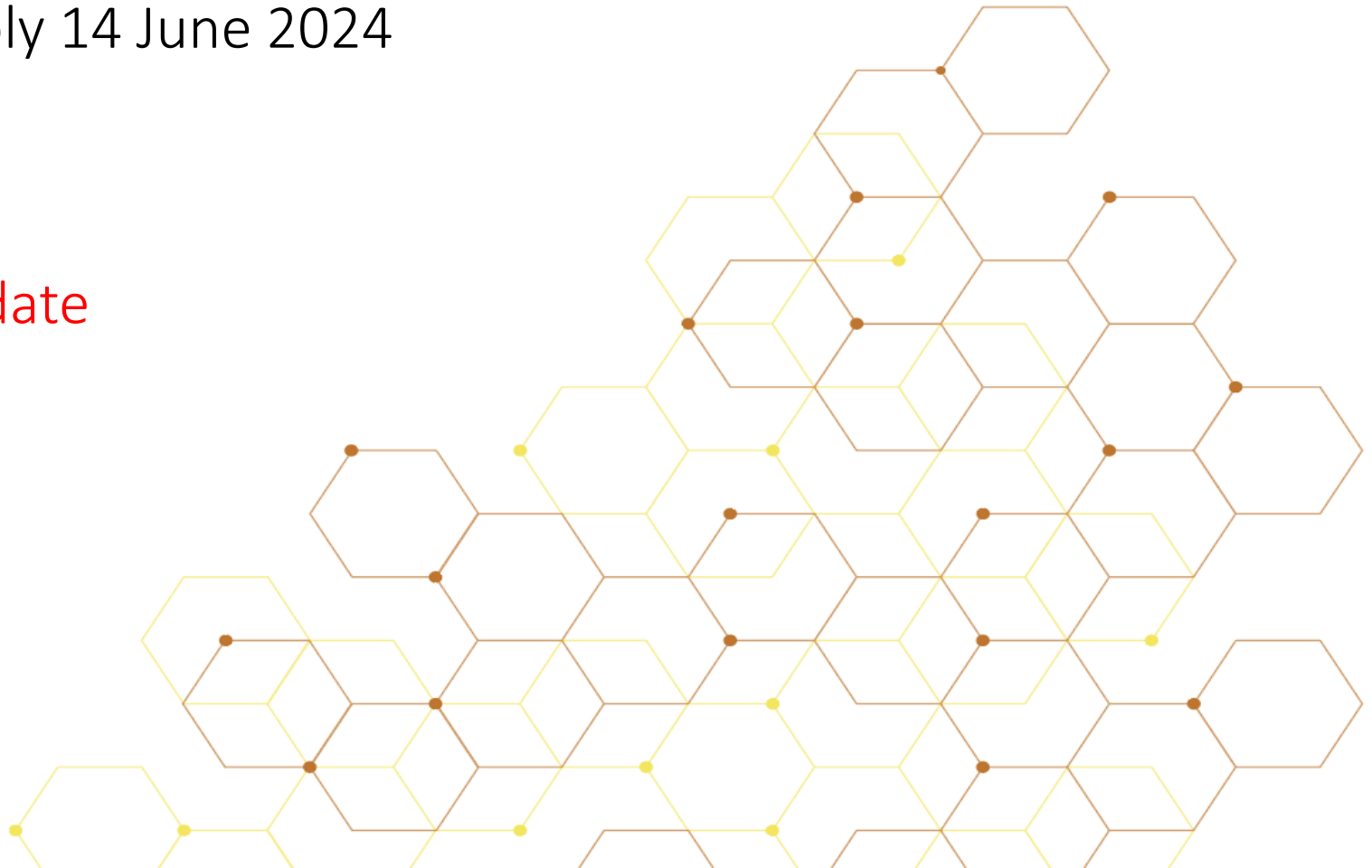
European Manufacturers Paper Honeycomb Association

European Manufacturers of Paper Honeycomb Association				
	Budget 2024	Actual 2024	Budget 2025	Budget 2026
	Euro	Euro	Euro	Euro
INCOME				
Entry fees	0	5.000	5.000	0
Membership fees (see right)	39.000	39.000	42.000	45.000
Associated members	1.500	8.500	9.000	9.000
Sponsors	1.500		0	
Other income	19.500	20.500	PM	PM
TOTAL INCOME	61.500	73.000	56.000	54.000
EXPENSES				
Secretariat				
- Daily management Secretariat	6.800	6.800	7.000	7.210
- Financial administration	4.200	4.200	4.325	4.455
- Supporting Board and committees	15.900	15.900	16.380	16.871
	26.900	26.900	27.705	28.536
General expenses				
Meeting costs (room rental)	5.000	5.642	5.000	5.000
Travel and stay secretariat	750	875	750	750
Telephone- fax costs secretariat	175	182	175	175
Office expenses	225	347	250	250
Legal cost / domicile	1.250	580	1.250	1.201
Bank costs	200	134	200	200
Provision bad debtors	PM	0	PM	PM
Other	725	752	725	700
	8.325	8.513	8.350	8.276
Marketing expenses				
- Promotional activities	8.000	7.300	8.000	13.200
- Industry statistics	18.300	24.057	800	783
- Third party subscriptions	3.000	3.390	3.500	3.500
- External web provider, incl. hosting, technical updates CMS	2.500	2.750	2.500	2.575
- Website maintenance & update	2.250	2.250	2.250	2.250
	34.050	39.747	17.050	22.308
TOTAL EXPENSES	69.275	75.160	53.105	59.120
RESULT				
	-7.775	-2.160	2.895	-5.120
CAPITAL 1st January	49.268	49.268	47.108	49.804
CAPITAL 31 December	41.493	47.108	50.003	44.684



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6. EMPHA Membership update



Membership types & their rights

- Active Membership: European Manufacturers

- Paper Honeycomb Core (primary or secondary activity)

- Paper Honeycomb Board

- Full voting rights

- Associate Membership: Non-European Manufacturers

- Paper Honeycomb

- Paper Honeycomb Board

- No voting rights

- Number of members restricted to 30% of Active Members

- Supplier Members: Suppliers to the Paper Honeycomb Core & Board Manufacturers

- Material Suppliers

- Equipment Suppliers

- Service Suppliers

- No voting rights

- Number of members restricted to 50% of Active & Associate Members



EMPHA Membership Update – 19 in total

13 Active Members:

1. Axxor B.V.
2. Cartoflex Honeycomb Paper Industries
3. DS Smith Packging Portugal
4. Dufaylite Developments Ltd.
5. Europal Packaging NV
6. FORLIT, a.s.
7. GRUDEM
8. Yamaton Honicore B.V.
9. l'hexagone
10. SWAP GmbH Verbundwerkstoffe
11. TI-VU Plast SRL
12. Tonelli S.p.A.
13. Yamaton Paper GmbH

1 Associate Member:

1. Emballages LM Packaging inc

5 Supplier Members:

1. DS SMITH
2. Karl Marbach GmbH & Co. KG
3. Saica Paper France
4. schoen + sandt machinery GmbH
5. Universal Corrugated



EMPHA Past Members or Interested in Membership

Smurfit Kappa Group (NL, FR, E)

Bestem (PL)

Grigeo (LT)

Pallite (UK)

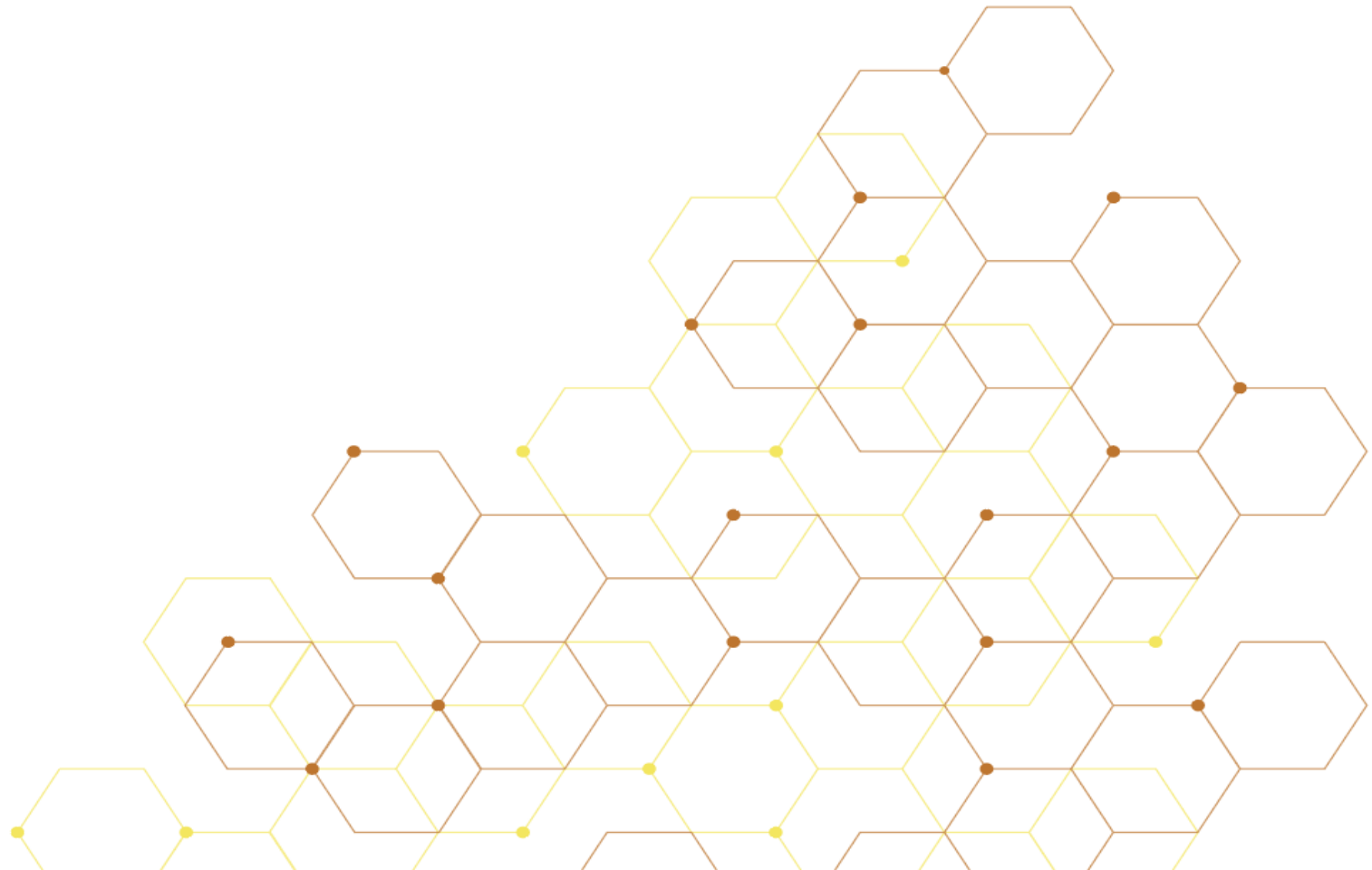
BEWI Cellpack (DK)

Gatner (PL)

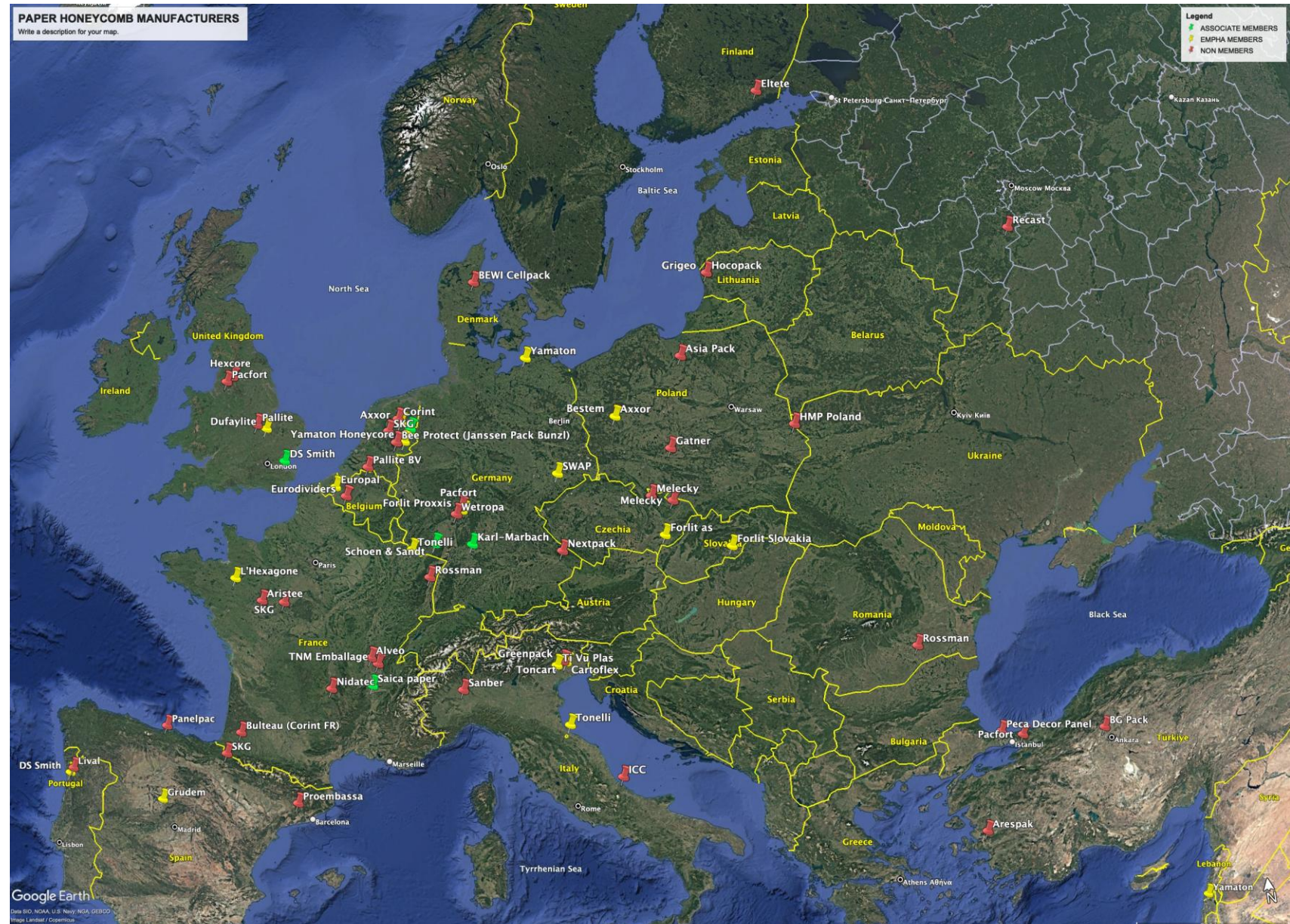
Wetropa (DE)



European Manufacturers Paper Honeycomb Association



EUROPEAN PAPER HONEYCOMB MANUFACTURERS



EMPHA Potential Members

Rossmann (FR, RO)

Pacfort (D, UK,)

Nextpack (D)

HMP (PL)

Asiapack (PL)

Corint (NL)

Bulteau (FR)

Meleky (CZ)

Greenpack (I)

Eltete TPM (FI)

Hexcore (UK)

Aristee (FR)

Alveo (FR)

TNM Emballage (FR)

Lival (P)

Nidatec (FR, NL)

Panelpack (E)

Proembassa (E)

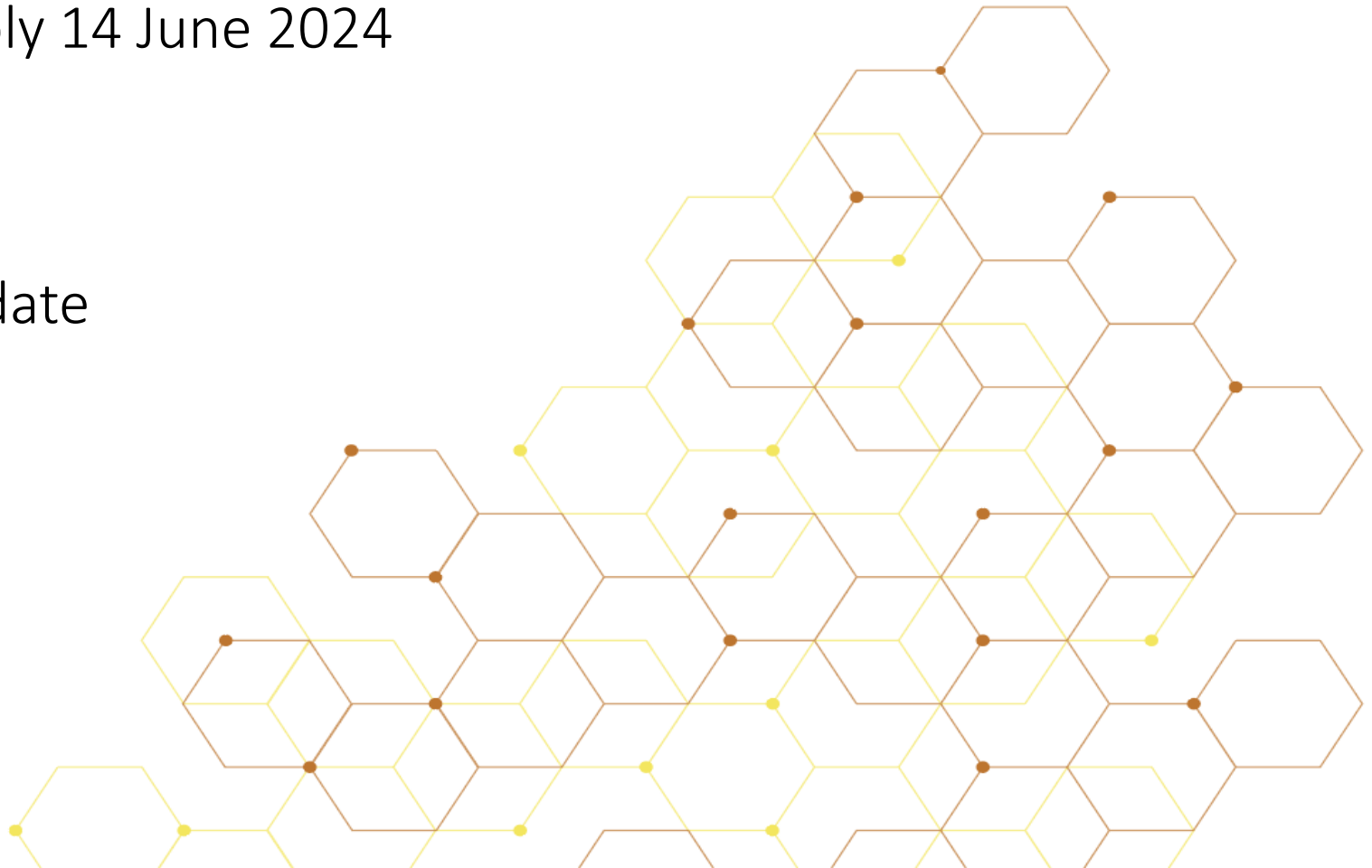
Sanber (I)

ICC (I)



Agenda

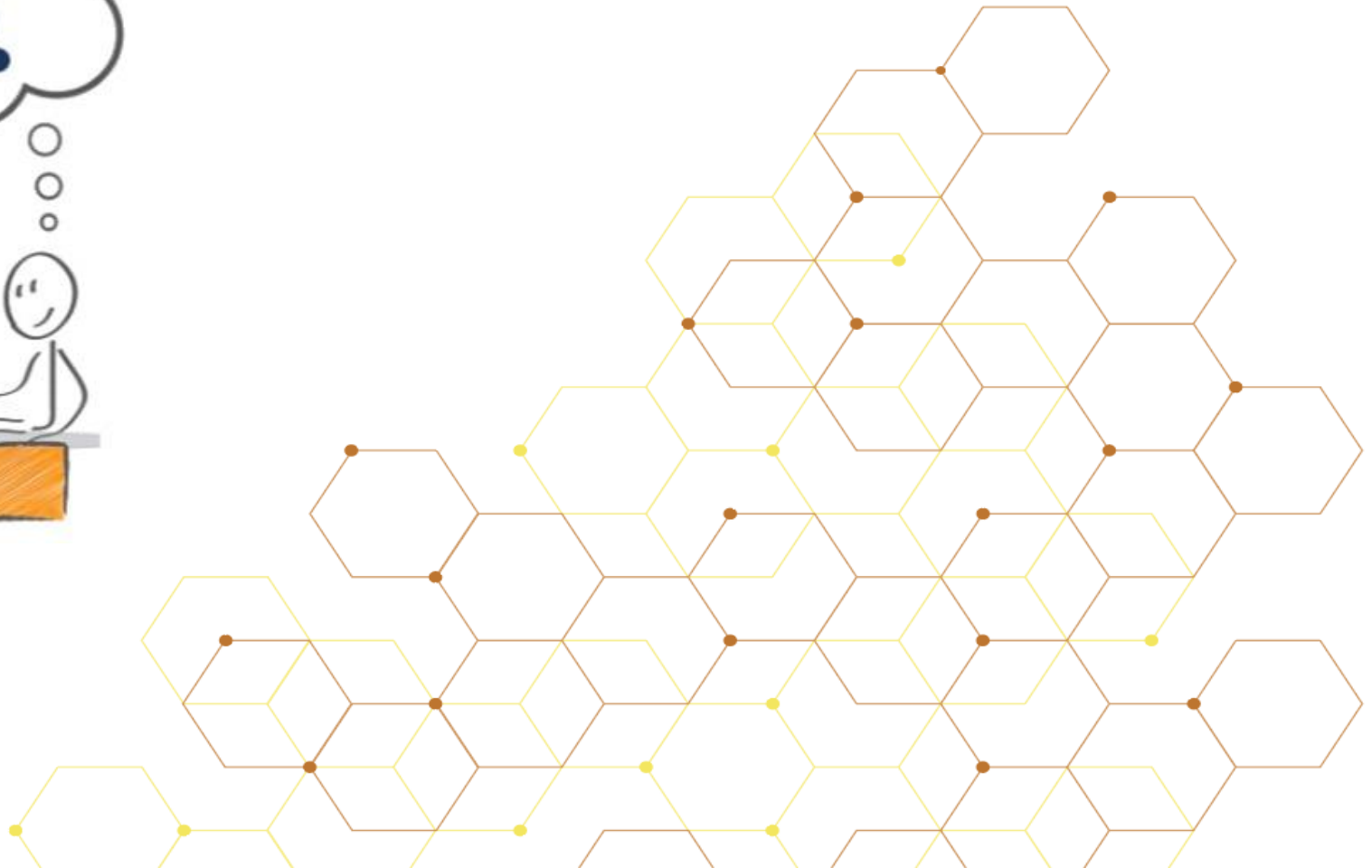
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Round Table



European Manufacturers Paper Honeycomb Association



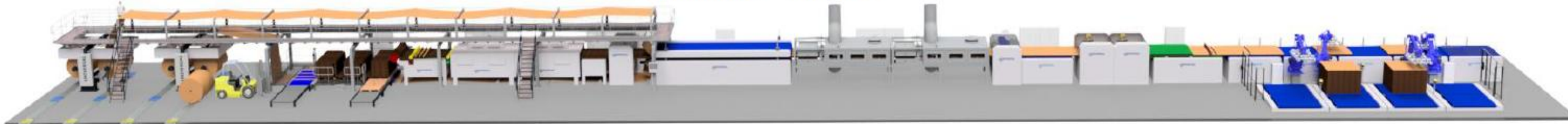
UPPL, Universal Panel Production Line - EMPHA 2025



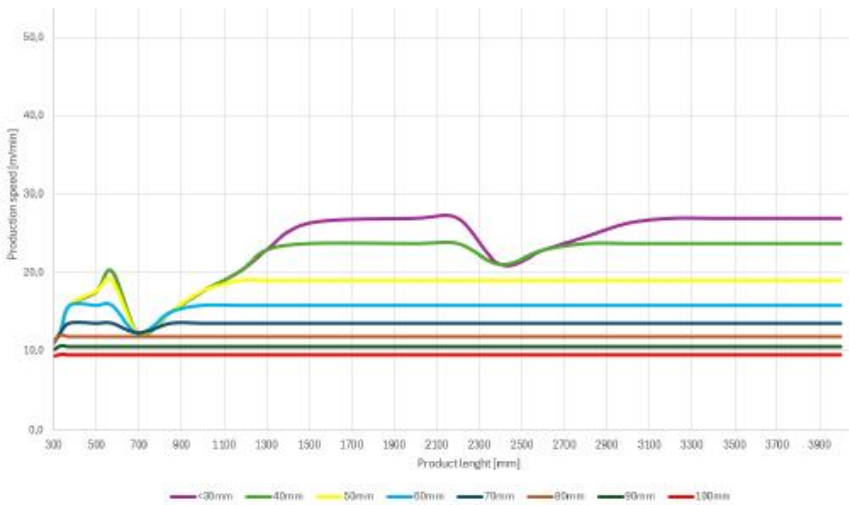
Eco-Line



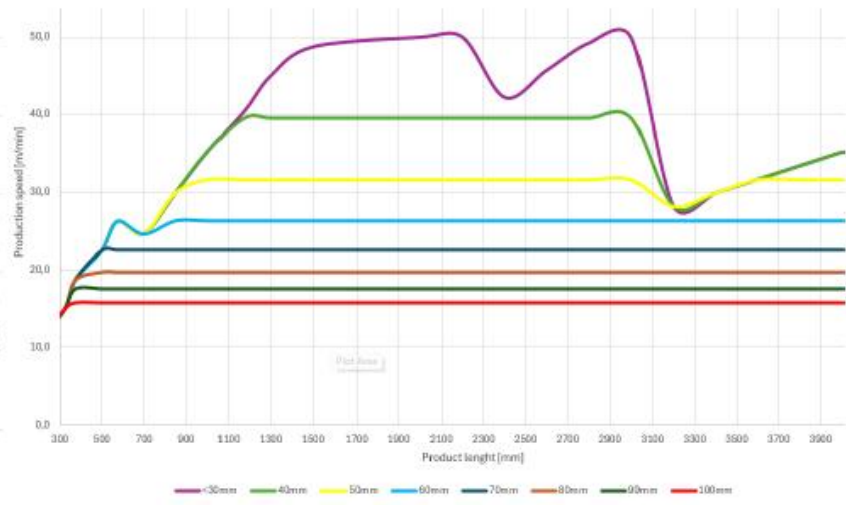
Volume-Line



Eco-Line (based on cell 12mm)



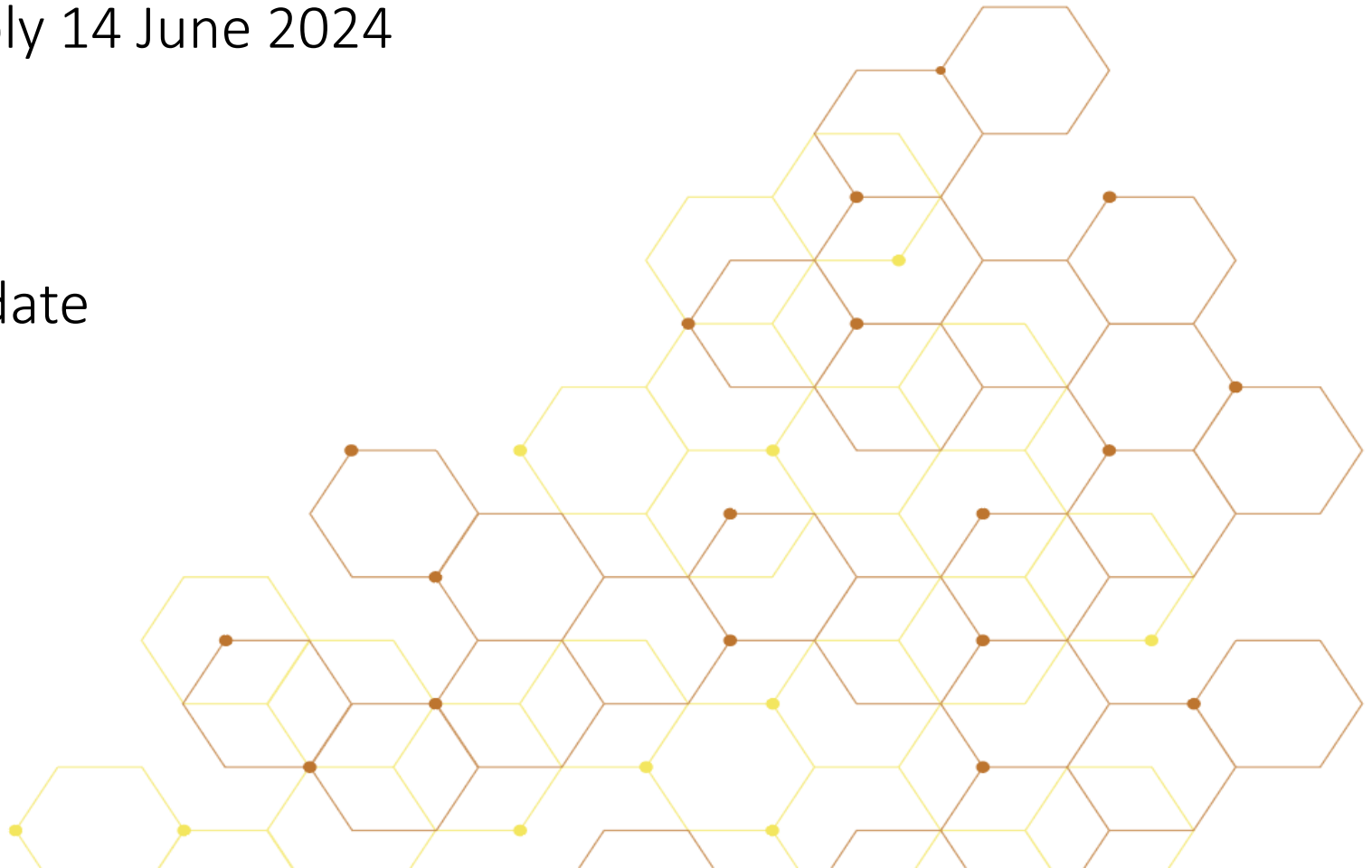
Volume-Line (based on cell 12mm)



Specification	Value
Max production speed	50 m/min
Min height	6 mm
Max height	100 mm
Min plate length	300 mm*
Min plate width	150 mm*
Max plate length	4000 mm*
Max plate width	2200 mm (2440 mm possible)
Length of Panel Line	80 to 100 meter*

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EMPHA

General Assembly 2026

11 & 12 June
Hosted by???



European Manufacturers Paper Honeycomb Association

Past EMPHA Meetings

- 2010
 - June: Foundation in Amsterdam
 - November: First GA in Amsterdam
- 2011
 - Venice, Italy
 - Dinner hosted by Cartoflex & Tonelli
- 2012
 - Bordeaux, France
 - Dinner hosted by Axxor & l'hexagone
- 2013
 - Vilnius, Lithuania
 - Dinner hosted by Grigeo Klaipėda
- 2014
 - Bologna, Italy
 - Dinner hosted by Tonelli
- 2015
 - Poznan, Poland
 - Dinner hosted by Axxor
- 2016
 - Noordwijk, the Netherlands
 - Dinner hosted by Smurfit Kappa Hexacomb
- 2017
 - Aalborg, Denmark
 - Dinner hosted by Honeycomb, Cellpack
- 2018
 - Cambridge, UK
 - Dinner hosted by Dufaylite
- 2019
 - Prague, Czech Republic
 - Dinner hosted by Forlit
- 2020
 - Online
- 2021
 - Online
- 2022
 - Rostock, Germany
 - Dinner hosted by Yamaton
- 2023
 - Henley-on-Thames
 - Dinner hosted by EMPHA
- 2024
 - Heilbronn, Germany
 - Dinner hosted by Marbach
- 2025
 - Segovia, Spain
 - Dinner hosted by Grudem



Any Other Business?



European Manufacturers Paper Honeycomb Association



Thank You



European Manufacturers Paper Honeycomb Association

