
TWO SIDES
www.twosides.info
LOVE PAPER
www.lovepaper.org
Two Sides
Partners Webinar
24th January, 9.30 – 11.30 GMT (10:30 – 12:30 CET)

# Housekeeping

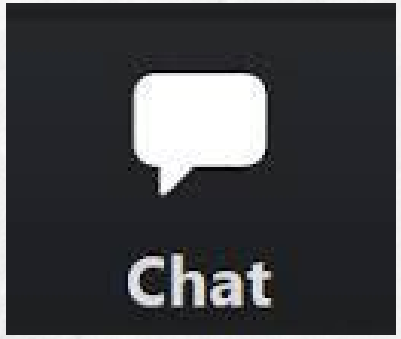



**Please ask questions throughout**

We will have 15 minutes at the end of the webinar for questions

We will follow up on all questions we haven't been able to answer live

Use the thumbs-up to up-vote your favourite questions




Please **don't** put your questions in the chat function.

But feel free to put any other comments in this section, chat among yourselves or post any ideas you might have!




This session is being recorded. A copy will be shared afterwards!

# Agenda (Times GMT, London)

| | |
|---|---|
| 9.30 GMT | Welcome, Introductions and Agenda |
| 9.35 – 9.40 | Two Sides Structure & Overview |
| 9.40 – 10.10 | Two Sides Campaign Activity, Progress & Development |
| 10.10 – 10.55 | **The European economy – from one shock to the next !**<br>Andrea Boltho, Emeritus Fellow of Magdalen College, Oxford, and Director of Oxford Economics. |
| 10.55 – 11.15 | Two Sides Marketing Materials and Tools |
| 11.15 – 11.30 | Questions and Your Comments |

# Partners Seminar 2025

TWO SIDES

## What do we want you to get out of this?

**To be informed about;**

- The campaigns we run
- Our plans for 2025
- How to make the most out of your membership
- The tools and resources available to you

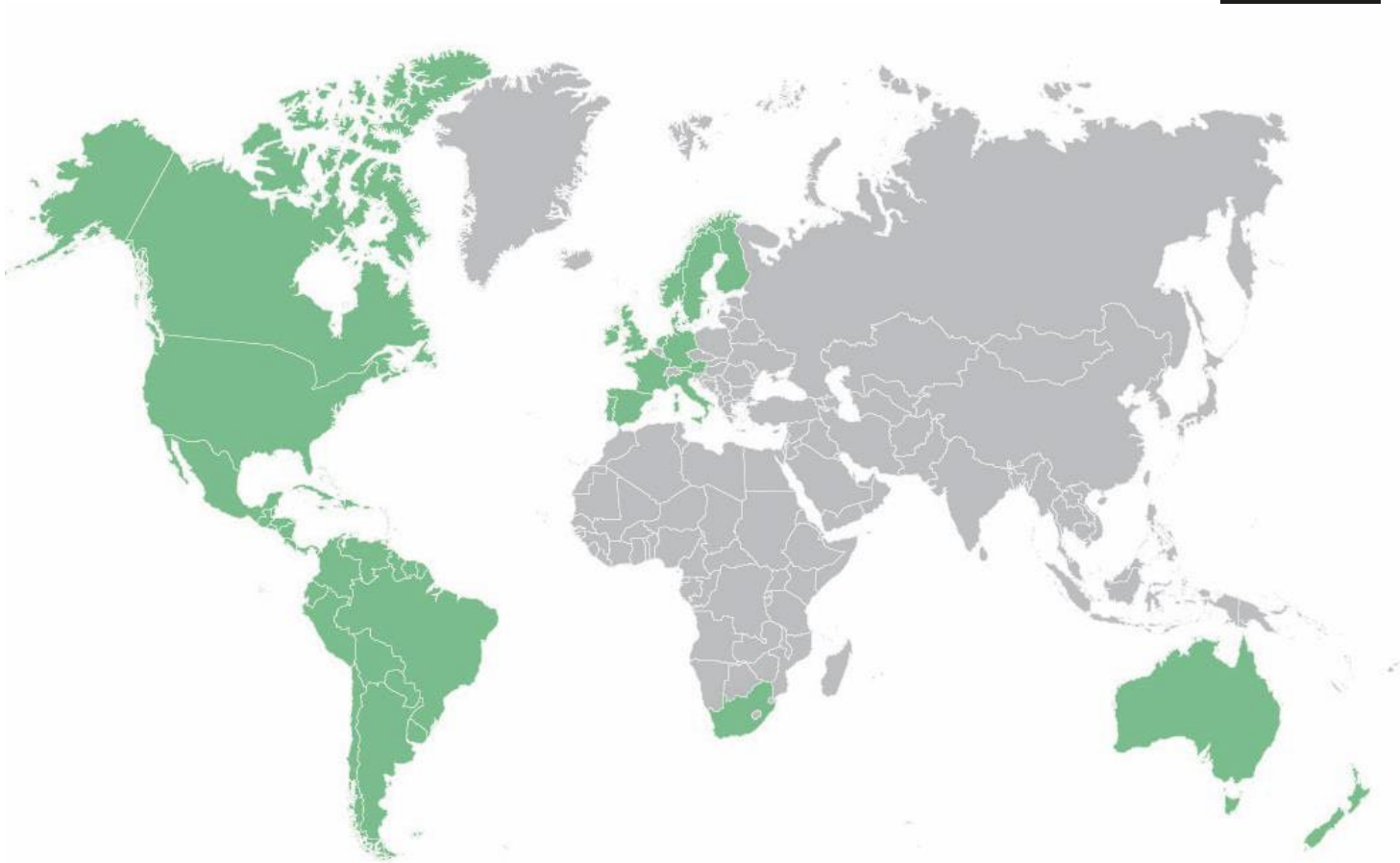
**To get your thoughts, ideas and input**


Two Sides
Structure & Overview

# About Two Sides

Founded in 2008, Two Sides is a global **not-for-profit**, membership organisation promoting the unique sustainable and attractive attributes of print, paper and paper-based packaging.

600 members globally



Members include;

Industry associations, paper manufactures and distributors, printers, mailing houses, postal operators, envelope manufacturers, packaging convertors, OEMS (like, Canon, HP, Xerox)…

# Europe – Country Managers



**Martyn Eustace**
Chairman



**Jonathan Tame**
Managing Director
Two Sides Europe



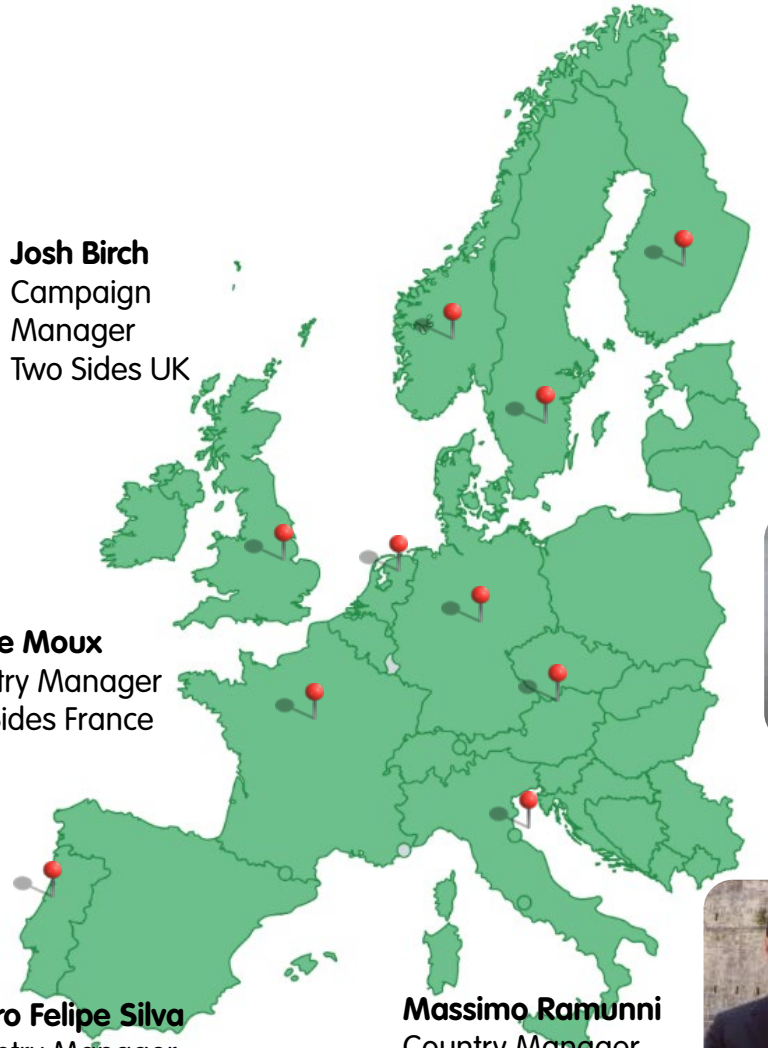
**Josh Birch**
Campaign
Manager
Two Sides UK



**Jan Le Moux**
Country Manager
Two Sides France

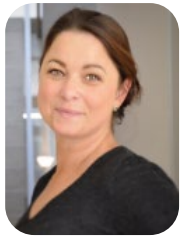


**Pedro Felipe Silva**
Country Manager
Two Sides Portugal





**Magnus Thorkildsen**
Country Manager
Two Sides Nordics





**Naciye Schmidt** and
**Anne-Katrin Kohlmorgen**
Country Managers
Two Sides Germany



**Massimo Ramunni**
Country Manager
Two Sides Italy

# Global Reach



**Jules Van Sant**
Executive Director
Two Sides
North America



**Jill Crossley**
Director of Operations
Two Sides
North America



**Jonathan Tame**
Managing Director,
Two Sides Europe



**Martyn Eustace**
Chairman
Two Sides



**Kellie Northwood**
Executive Director,
Two Sides Australia and
New Zealand



**Fabio Mortara**
President
Two Sides Latin America



**Manoel Manteigas de Oliveira**
Technical Director,
Two Sides Latin America



**Deon Joubert**
Executive Director,
Two Sides South Africa

# Central Marketing Team



**Martyn Eustace**
Chairman

**Jonathan Tame**
Managing Director





**Josh Birch**
Campaign Manager



**Tandy Wakeford**
Marketing Executive



**Gina Smith**
Greenwash, Membership & Events Manager



**Laura Clarke**
Design and Marketing Executive

# Sustainability Steering Group

| Delegate | Organisation | Sector reflected |
|---|---|---|
| Cynthia Wee | Communications Manager, PostEurop | Post |
| Dr Rick Stunt | Group Paper Director of Associated Newspapers UK and Chairman of NME Newsprint and Environment Working Group | Newspapers |
| Sarah Lesting | Head of Sustainable Solutions & Managing Director UK, Leipa | Paper Manufacture |
| Marie-Claude Ritt | Sustainability Manager, Sylvamo | Paper Manufacture |
| Niina Niemela | Senior Manager, Sustainability, UPM | Paper Manufacture |
| Pedro Filipe Silva | Sustainability Manager, The Navigator Company | Paper Manufacture |
| Isabella Bussi | Group Head of Sustainability, Fedrigoni | Paper Manufacture |
| Sandrina Machado | Product stewardship and environmental specialist, Sappi | Paper Manufacture |
| Laetitia Reynaud | Policy Advisor, Intergraf, | Printing |
| Jens Kriete | Sustainability Manager, Koeheler Group | Paper Manufacture |
| Viktor Kovacic | Managing Director, FEPE | Envelope Manufacture |
| Marco Martinez | Product Manager Release Liners and Sustainability. Ahlstrom- Munksjö | Labels and Packaging |
| Deborah Dorosz<br>Nicolas Coupry | Sustainability Manager, Antalis<br>Marketing and Sustainability Manager, Antalis | Paper Manufacture and Distribution |
| Louis Peake | Group Sustainability Engagement Manager, Smurfit Kappa | Packaging Manufacture |
| Rebecca Elliott | Compliance & Sustainability Manager, Elliott Baxter | Paper Distribution |
| Karoline Angerer | Sustainability Manager Kraftpaper and Paper Bags, Mondi | Paper Manufacture |
| Martyn Eustace | Two Sides, Chairman | |
| Jonathan Tame | Two Sides, Managing Director | |
| Josh Birch | Two Sides, Campaign Manager | |

# Marketing Steering Group

| Delegate | Organisation | Sector reflected |
|---|---|---|
| Stephanie Kienapfel | Mondi - Head of Marketing & Business Development, Mondi Uncoated Fine Paper | Paper Manufacture |
| Kati Murto | UPM – Vice President, Stakeholder relations - | Paper Manufacture |
| Fredrik Holgersson | Holmen – Senior Vice President Sales | Paper Manufacture |
| Wim Dootselaere | Sylvamo – Head of Marketing | Paper Manufacture |
| Wolfgang Bürgers | Leipa - Marketing & Sales Director | Paper Manufacture |
| Margarita Goltz | Sappi Europe - Marketing Communications | Paper Manufacture |
| Catarina Novais | The Navigator Company – Marketing Director | Paper Manufacture |
| José Manuel Pinheiro | The Navigator Company – Head of marketing Tissue | Paper Manufacture |
| Micaela di Trana | Fedrigoni, Marketing and R&D Director | Paper Manufacture |
| Maren Fohrmann | Igepa – Marketing Manager | Eugropa – Paper Merchant |
| Brigitte Abessira | Antalis – Communication Manager | Eugropa – Paper Merchant |
| Mathew Faulkner | Canon - Head of Marketing EMEA | OEM |
| James Hewes | PRCA – CEO Public Relations & Communications Association | PR & Communications |
| Mark Davies | Whistl - Managing Director DoorDrop media and President of ELMA (the European Letterbox Marketing Association) | Mail and Door Drops |
| Mike Turner | ECMA - (European Carton Makers Association) Managing Director | Packaging |
| Jan Le Moux | Two Sides Country Manager - France | Two Sides |
| Anne-Katrin Kohlmorgen | Two Sides Country Manager - Germany | Two Sides |
| Josh Birch | Two Sides Campaign Manager - UK | Two Sides |
| Martyn Eustace | Two Sides - Chairman | Two Sides |
| Jonathan Tame | Two Sides - Managing Director | Two Sides |

# 8 New Central Members in 2024

## NEW Central Members

- Baumer hhs Gmbh
- Co-Ro
- Czech Publishing Association
- ECPA
- EMPHA - the European Manufacturers Paper Honeycomb Association
- Koehler Paper SE
- Lenzing Papier GmbH
- PulPac AB

## 3 NEW UK Members in 2025

- Birch Print
- Formara Ltd
- Touch Design

## 17 NEW UK Members in 2024

- Acorn Web Offset Ltd
- Anderton Board
- Bahson Colour Print Ltd
- Colombier
- Frugalpac Ltd
- Inkfish Solutions
- iSupply
- IT Solutions Services
- Konica Minolta
- L&S Printing Company Ltd
- Mail Masters (Scotland) Ltd t/a PM Solutions
- McAllister Litho Glasgow
- PMG Print Management Limited
- Screen Europe (UK)
- Sharp Printing Limited
- The Meliora Group
- Weatherbys

# Two Sides Focus





# Anti-Greenwash Campaign

## Tackling negative statements about paper and paper packaging

# Greenwash spans both paper and paper packaging sectors

- Persistent messages driving consumers to digital communications
- Changes to EU Packaging Waste Directive, will reduce secondary packaging
- An increase of Greenwash messages related to packaging reduction is expected
- Boutique manufacturers of alternative "Tree-Free" paper (bamboo, grass) seize opportunity to make sensational misleading and exaggerated statements
- NGOs and campaigns, example Canopy, World Counts, pushing the narrative on alternative fibre, resource efficiency, and using less




TWO SIDES

**European Green Deal: Putting an end to wasteful packaging, boosting reuse and recycling**

On average, each European generates almost 180 kg of packaging waste per year. Packaging is one of the main users of virgin materials as 40% of plastics and 50% of paper used in the EU is destined for packaging.

European Commission



DESIGN

**Brands get creative to ditch secondary packaging**

Consumers are tired of excess packaging. Brands are seeking to meet environmental demands without selling their products short

# Current German Examples

## BMW Financial Services

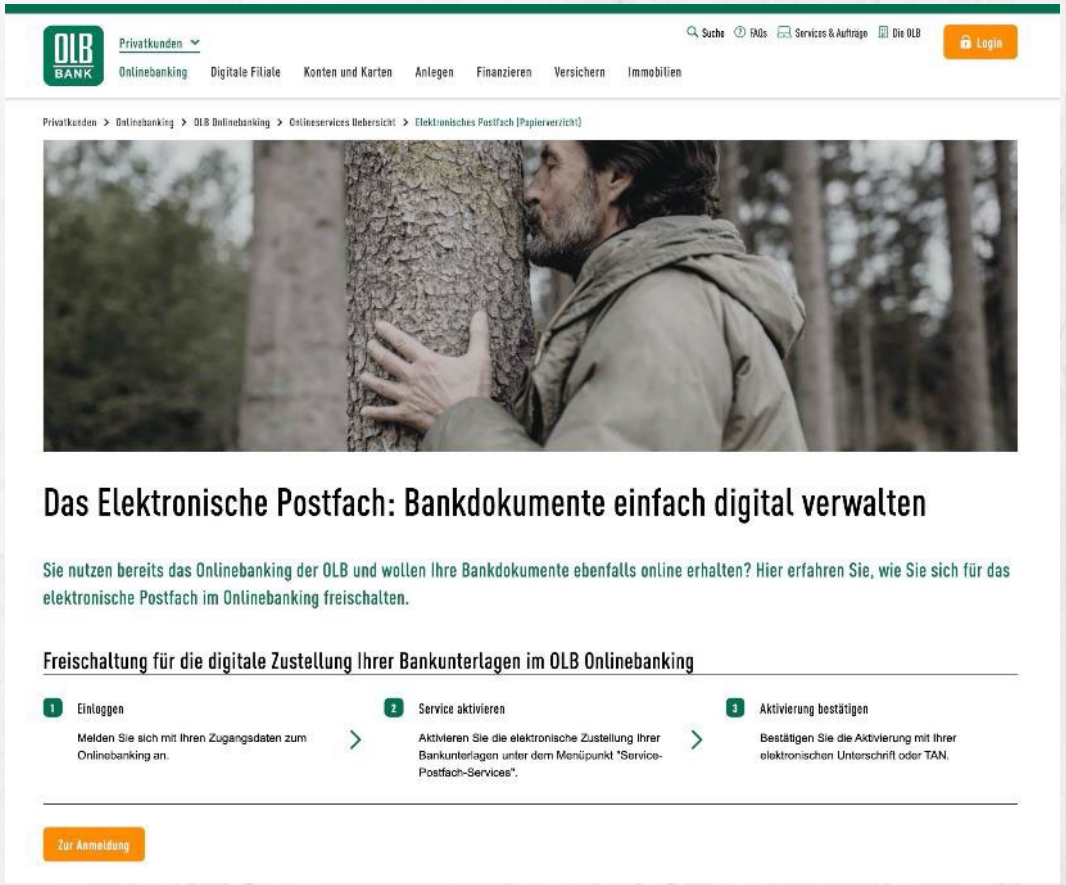



Sehr geehrte Damen und Herren,

**Ressourcenschonung** steht bei der **BMW Group** im **Zentrum** der Unternehmensausrichtung. Dies beschränkt sich nicht nur auf die Fahrzeugproduktion, sondern umfasst alle Unternehmensteile. Wir, die BMW Bank als Teil der BMW Group, möchten gerne gemeinsam mit Ihnen ebenfalls einen Beitrag leisten, um unseren **ökologischen Fußabdruck** weiter zu **reduzieren**.

Vor diesem Hintergrund haben wir uns vorgenommen, weitestgehend auf **Papier** zu **verzichten**. Wir freuen uns sehr, wenn Sie uns bei diesem Vorhaben unterstützen und unser **Online-Portal Mein BMW Financial Services** nutzen. Dort haben Sie **papierlosen Zugriff** auf **Schreiben** der BMW Bank und für Sie relevante Informationen – **übersichtlich** und **klimaschonend**.

## Oldenburgische Landesbank



# Adidas – Success August 2024

6,06 million customers




*NO MORE UNNECESSARY PAPER*
*We have set ourselves the goal of reducing our carbon footprint. Using less paper brings us one step closer to this goal.*

"After internal review, we can advise that the statement you referenced is not part of our current or future communications plan. we continue to check our statements on paper as part of our checks."

# Esprit – Success October 2024

4,5 million customers

https://www.esprit.com/de/company/legal/elektronische-rechnungsverarbeitung

| | PDF e-Invoice | PDF Image | Papier |
|---|---|---|---|
| Papier vermeiden (nachhaltig sein) | ✓ | ✓ | ✗ |
| Geld für die Post sparen | ✓ | ✓ | ✗ |
| Verbesserte Transparenz | ✓ | (✓) | (✓) |
| Verbesserte Datenqualität und -genauigkeit | ✓ | (✓) | (✓) |
| Lieferanten sehen den Status der Rechnungen | ✓ | ✗ | ✗ |

Die beste Lösung für Sie

✓ Hoher Vorteil (✓) Mittlerer Vorteil ✗ Kein Vorte

PDF e-Invoice

PDF Image

Papier

Als letzte Möglichkeit können Sie Rechnungen in Papierform
bevorzugte Option und diejenige mit den wenigsten Vorteilen
Anforderungen, die im folgenden Lieferantenleitfaden aufgefü
sorgfältig zu lesen und zu befolgen, um zu vermeiden, dass Ih
Rechnung - Lieferantenleitfaden

## Removed from Website

esprit.com/de/company/legal/elektronische-rechnungsverarbeitung

ESPRIT

**404**

The page you are looking for could not be found

Return Home

*"Avoid paper (be sustainable)" "This is our least preferred option and the one with the least benefits for you. Help us save paper and refrain from sending invoices by post in the future."*

# Current French Examples









# Fonica



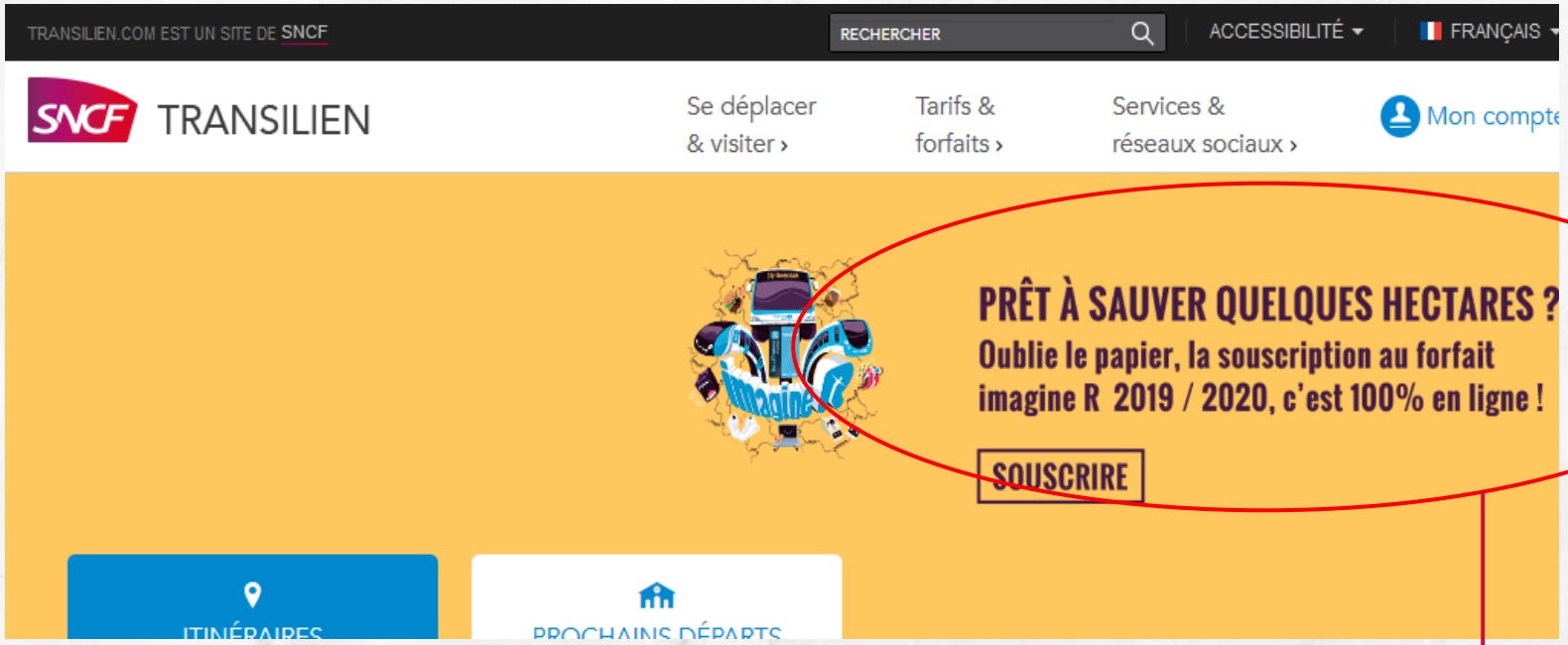

1 million customers

## Removed from Website

*Transition towards dematerialisation. Access your documents via myfonica.*

*Ecology and durability: eliminating the physical environment, reducing our impact on the environment by saving resources and minimizing waste*

# SNCF




156 million Passengers each year

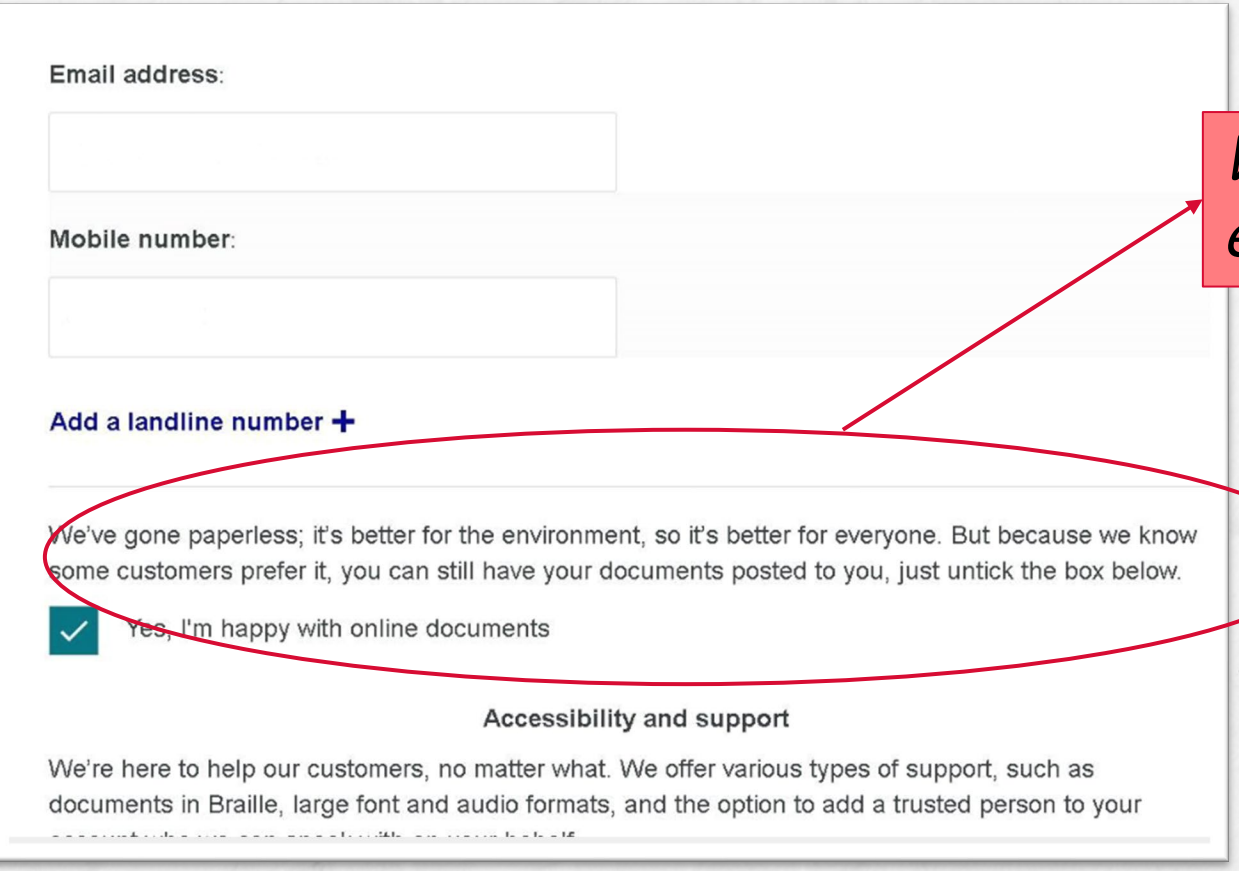
## Removed from Website

*Ready to save a few hectares.*

*Forget paper, subscribing to the imagine package. It's 100% online*

# AXA – Jan 2024

9 million customers




*We've gone paperless, it's better for the environment, so it's better for everyone.*

I can confirm that we will be removing the statement "*it's better for the environment, so it's better for everyone*" from AXA Insurance UK plc's marketing material. We will be making this change as soon as operationally feasible.

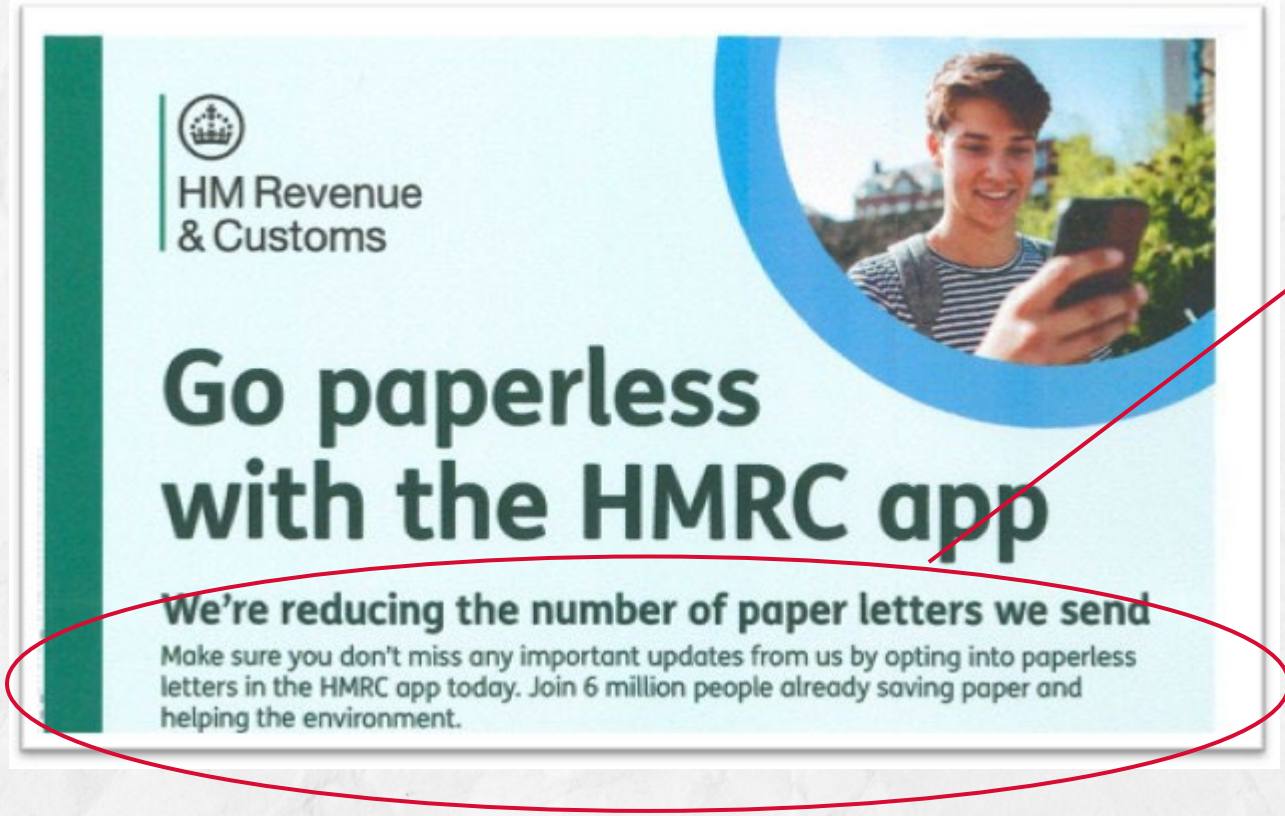
I would like to thank you for bringing this important matter to our attention.

Yours sincerely

Mark Gardner
Chief Counsel – AXA Insurance

# HMRC – Jan 2025

36 million Taxpayers




*Join 6 million people already saving paper and **helping the environment**.*

Further to our recent correspondence with your colleague Mr Tame, we are reviewing the language used to promote the HMRC app through our communications channels.

As we are a large organisation of 65,000 colleagues across wide business areas, these changes can take some time to be implemented. I am sorry you received another flyer with the previously flagged statement 'go paperless with the HMRC app and help the environment'.

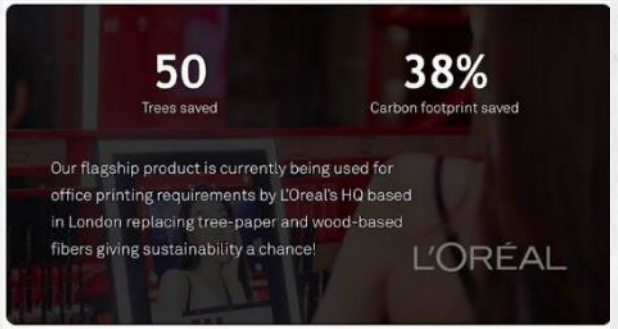
We are taking action to rectify this messaging as quickly as possible. I hope you find this reply helpful.

M Muluka Policy Correspondence Unit

envoPAP

The Sustainable Materials Company









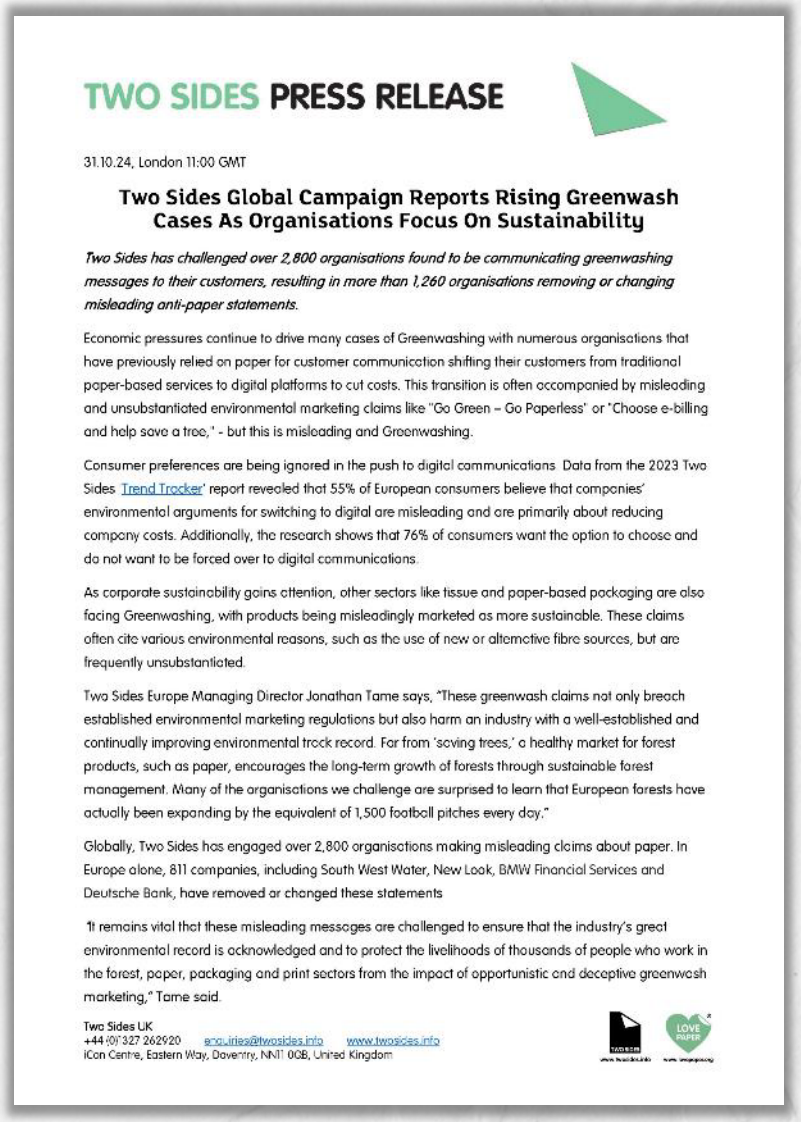

"EnvoPAP, a leading sustainable materials company, creates products from discarded agricultural fibres, offering a sustainable alternative to traditional paper and packaging materials that rely on deforestation and fossil fuels. This unique approach not only saves trees and reduces air pollution, but also minimises plastic waste, and supports fair pay for farmers. By ensuring the sustainability of our products' start, use, and end-of-life, envoPAP is leading the way to achieving Net Zero."

# Greenwash

As of Q4 2024:

- 2,848 Companies engaged **(1,832 EU)**
- 1,280 have changed their messages **(825 EU)**
- Global Press release update: **May 2025**



TWO SIDES PRESS RELEASE

31.10.24, London 11:00 GMT

**Two Sides Global Campaign Reports Rising Greenwash Cases As Organisations Focus On Sustainability**

*Two Sides has challenged over 2,800 organisations found to be communicating greenwashing messages to their customers, resulting in more than 1,260 organisations removing or changing misleading anti-paper statements.*

Economic pressures continue to drive many cases of Greenwashing with numerous organisations that have previously relied on paper for customer communication shifting their customers from traditional paper-based services to digital platforms to cut costs. This transition is often accompanied by misleading and unsubstantiated environmental marketing claims like "Go Green – Go Paperless" or "Choose e-billing and help save a tree," - but this is misleading and Greenwashing.

Consumer preferences are being ignored in the push to digital communications. Data from the 2023 Two Sides 'Trend Tracker' report revealed that 55% of European consumers believe that companies' environmental arguments for switching to digital are misleading and are primarily about reducing company costs. Additionally, the research shows that 76% of consumers want the option to choose and do not want to be forced over to digital communications.

As corporate sustainability gains attention, other sectors like tissue and paper-based packaging are also facing Greenwashing, with products being misleadingly marketed as more sustainable. These claims often cite various environmental reasons, such as the use of new or alternative fibre sources, but are frequently unsubstantiated.

Two Sides Europe Managing Director Jonathan Tame says, "These greenwash claims not only breach established environmental marketing regulations but also harm an industry with a well-established and continually improving environmental track record. 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 challenge are surprised to learn that European forests have actually been expanding by the equivalent of 1,500 football pitches every day."

Globally, Two Sides has engaged over 2,800 organisations making misleading claims about paper. In Europe alone, 811 companies, including South West Water, New Look, BMW Financial Services and Deutsche Bank, have removed or changed these statements

"It remains vital that these misleading messages are challenged to ensure that the industry's great environmental record is acknowledged and to protect the livelihoods of thousands of people who work in the forest, paper, packaging and print sectors from the impact of opportunistic and deceptive greenwash marketing," Tame said.

**Two Sides UK**
+44 (0)1327 262920 enquiries@twosides.info www.twosides.info
iCon Centre, Eastern Way, Daventry, NN11 0QB, United Kingdom

# Increased Brand Engagement to Prevent Greenwash

Resource to educate Brands and Marketeers on why they should **not** greenwash, covering;

- Papers environmental credentials
- The impact of digital
- The right to choose
- Advertising regulations

Two Sides and the industry should use this proactively

Published in English, German, French and Italian



## "Go Green, Go Paperless" Messages Are Misleading

### The Impact of Greenwashing

**Consumers are increasingly aware of the impact their choices have on the environment and are influenced by environmental or green claims made by trusted organisations. Greenwash is defined as "Behaviour or activities that make people believe that a company is doing more to protect the environment than it really is", (Cambridge Dictionary) or, "Disinformation disseminated by an organisation so as to present an environmentally responsible public image." (Wikipedia)**

Many leading organisations, including banks, utility companies and telecommunications providers, are urging their customers to go paperless with claims that paperless bills, statements and other electronic communications save trees, are "greener" and better for the environment.

These statements are **greenwashing**. They are not specific, not supported by reliable scientific evidence, life cycle analysis, and are misleading because they imply that electronic communication always has less effect on the environment than printed materials. This contravenes advertising regulations in most European countries.

**Examples of misleading statements;**

1. Go paperless, save trees and help save the planet
2. Move to email away from tree-mail
3. Go to digital statements and protect the environment

**These statements are not just misleading** but hugely damaging to an industry that employs in the UK alone, 116,000 people (1,096,000 EU), in more than 8,400 business (115,700 EU). Most commonly, the driving reason for this move to digital communication is cost reduction.

This information sheet will provide you with valuable facts and statistics that you should consider before encouraging your customers to switch to digital communication for environmental reasons.

**49% of consumers believe organisations promoting digital as better for the environment is really about saving cost.**

– Two Sides/Toluna, 2021.

*"Paper has a great sustainable story. Made from trees, it is a renewable and sustainable raw material and easy to recycle.*

*Raw materials from which digital equipment, servers and the equipment for how power is generated are often finite, precious, non-renewable materials and notoriously difficult to recycle."*

**Myth – Going paperless saves trees and stops deforestation**

It's common to see organisations make statements such as "save trees and stop deforestation" to encourage their customers to move from paper communications to electronic communications. In fact, these statements quite simply aren't true. Here's why:

A healthy market for forest products, such as paper, encourages the long-term growth of forests through sustainable forest management. Which, in turn, helps to mitigate climate change by absorbing $CO_2$.

Between 2005 and 2020, European forests, which provide 90% of the virgin wood fibre used by the European paper industry, grew by 58,390 $km^2$ – an area bigger than Switzerland and amounts to 1,500 football pitches of forest growth every day (United Nations FAO, 2020).

Providing an organisation is sourcing its paper from responsible producers, they should not be concerned about saving trees. Indeed, quite the opposite.

**Between 2005 and 2020, European forests grew by 1500 football pitches every day!**

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

TWO SIDES

www.twosides.info



# If you see Greenwash - report it!

greenwash@twosides.info


Improving public perceptions of paper
and paper-based packaging
LOVE
PAPER
®
www.lovepaper.org

# Global Reach

## Love Paper ads published in:

- Europe (UK, France, Germany, Italy, Sweden, Finland, Norway)
- USA & Canada
- Brazil & South America
- Australia & New Zealand






# Simple Messages

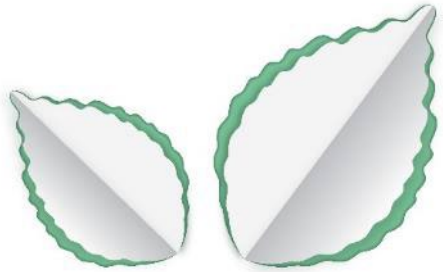


## PAPER REVOLUTION

71% of paper and 82% 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), 2021 and Eurostat, 2020.
Europe: EU27 + Norway, Switzerland and the UK

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



## 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 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.

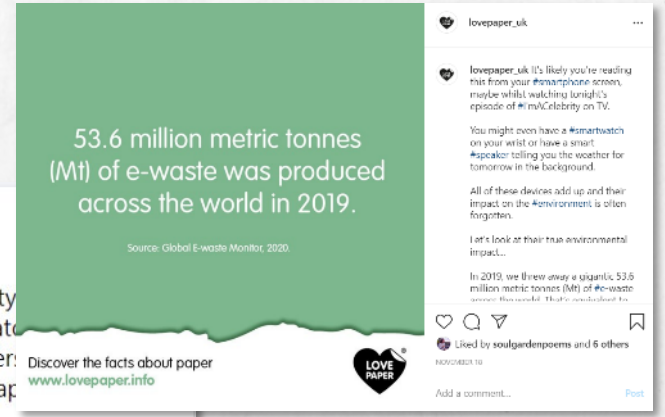
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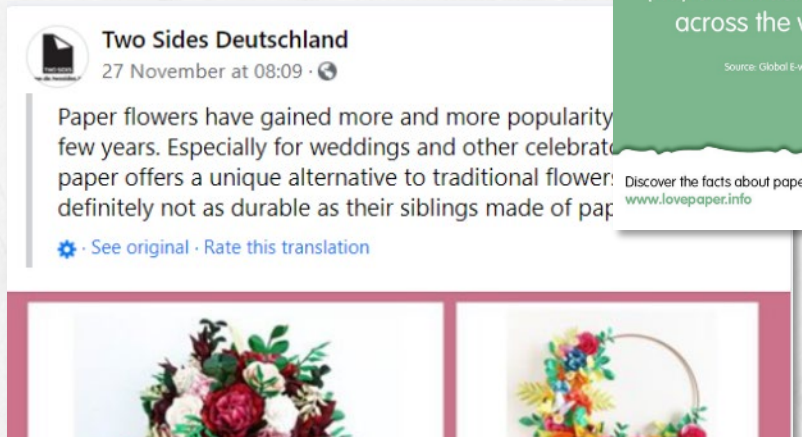
# Love Paper messages reach 230m+ European consumers every year. On the page and online




## Over 2,900 Love Paper adverts placed in Europe 2024



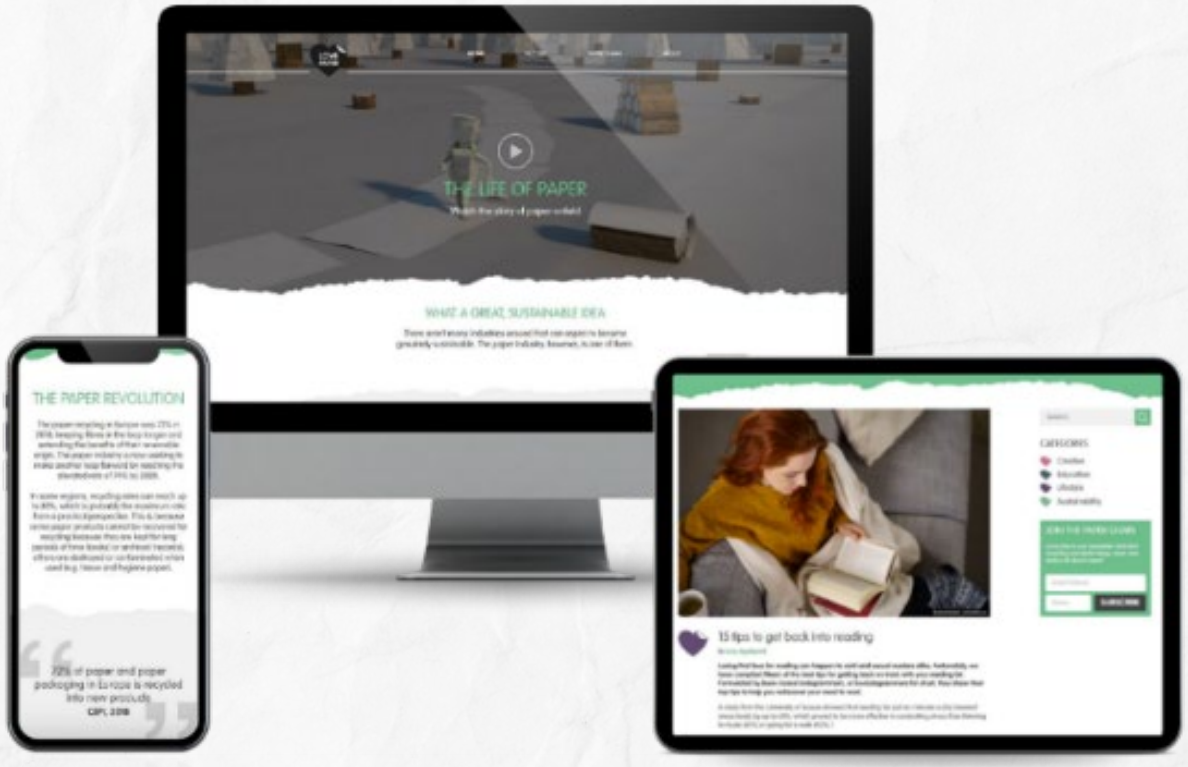



# Love Paper Website

Consumer friendly information for people who see adverts/social media posts and want more information.

Provides links to Two Sides website for  'deeper dive'




## Regional sites in:

Europe (English): https://lovepaper.org/

Germany: https://de.lovepaper.org/

Italy: https://it.lovepaper.org/

Brazil: https://lovepaper.org.br/

Latin America: https://al.lovepaper.org/

United States: https://lovepaperna.org/

Australia: https://lovepaper.org.au/

# Using The Love Paper Logo

The Love Paper logo is a registered trademark of Two Sides Ltd.

The logo **can be used by Two Sides members** on their communications or on client work.

Brands, manufacturers, publishers and retailers can register to use the logo under licenced agreement.

Wider users must agree to terms and conditions of use.

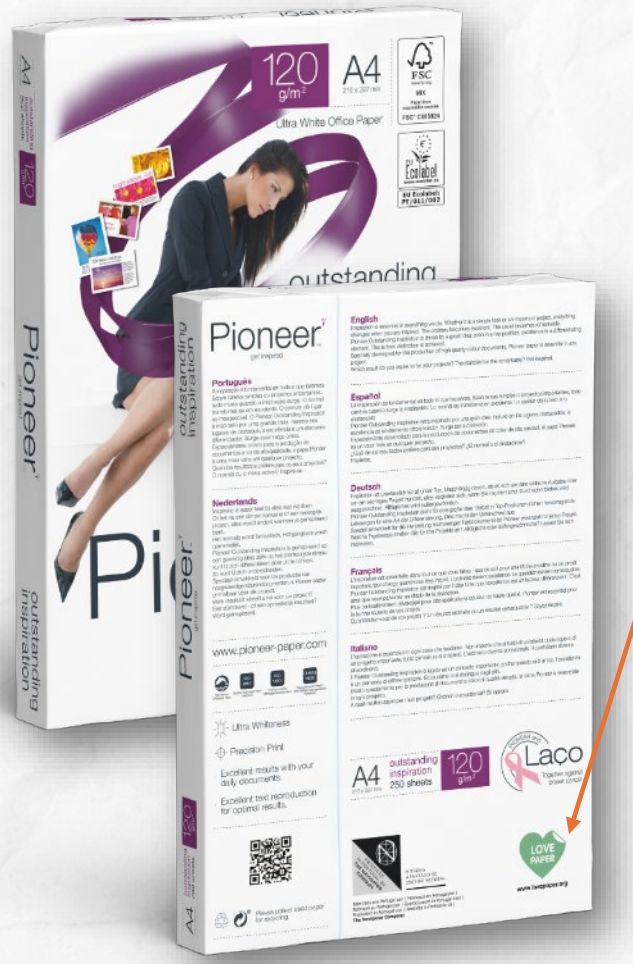
Products must comply with EUTR: European Union Timber Regulations (UKTR)

[www.lovepaper.org/logo](www.lovepaper.org/logo)



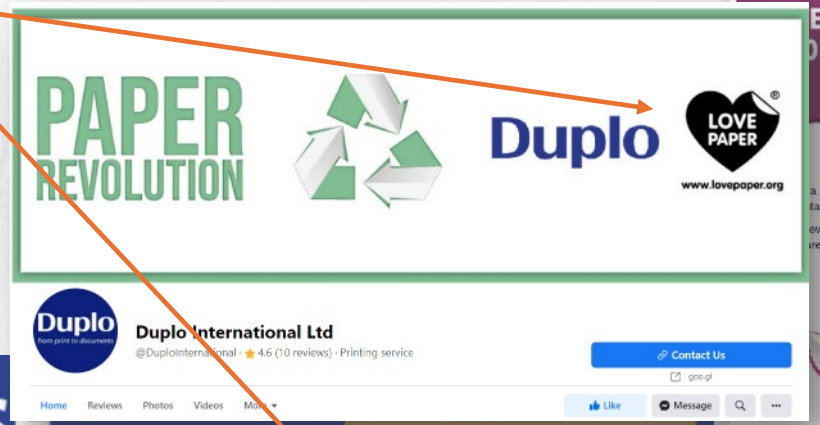


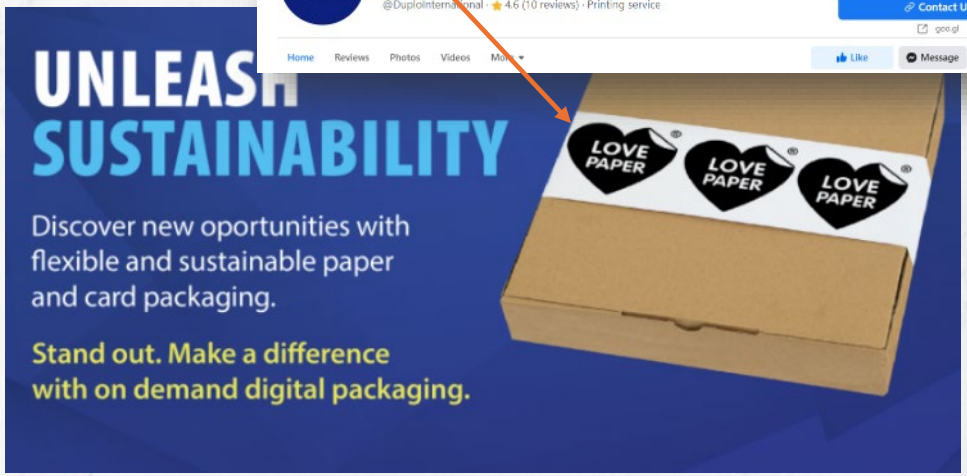

# Love Paper Product Promotion




LOVE PAPER®

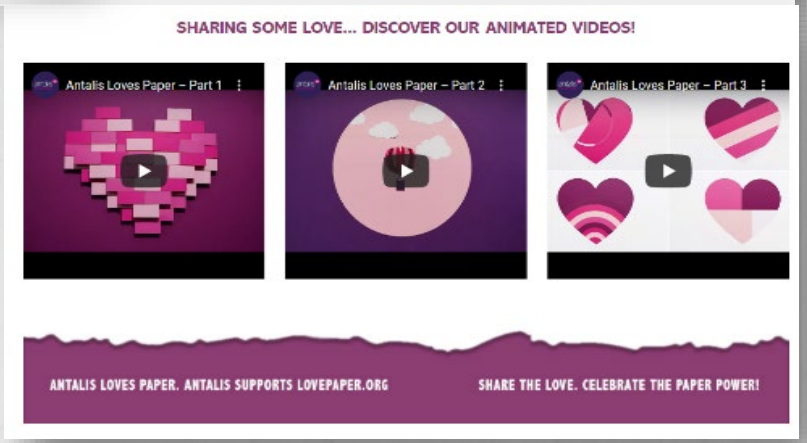








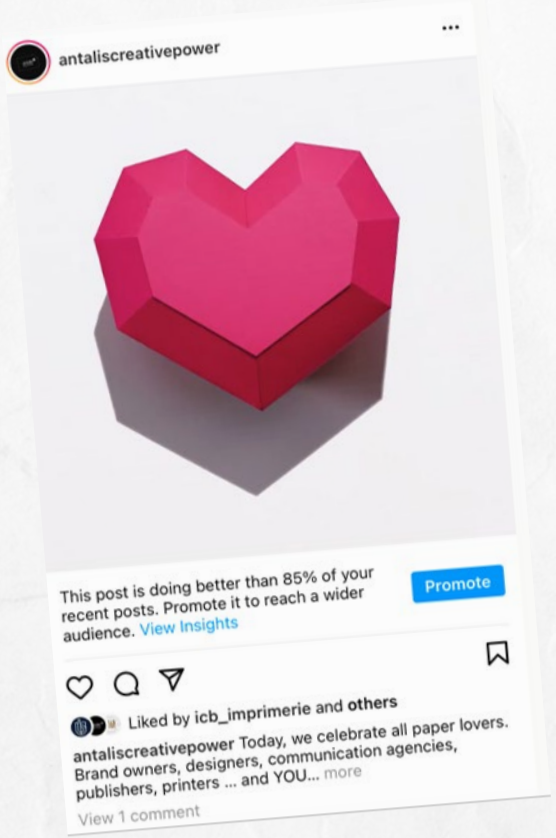
# Create your own campaign

Antalis paper merchant ran a Love Paper Valentine campaign on Social media

In 27 European Countries

Supported by a range of videos which were shared on social media

Link to the campaign messages through your own website





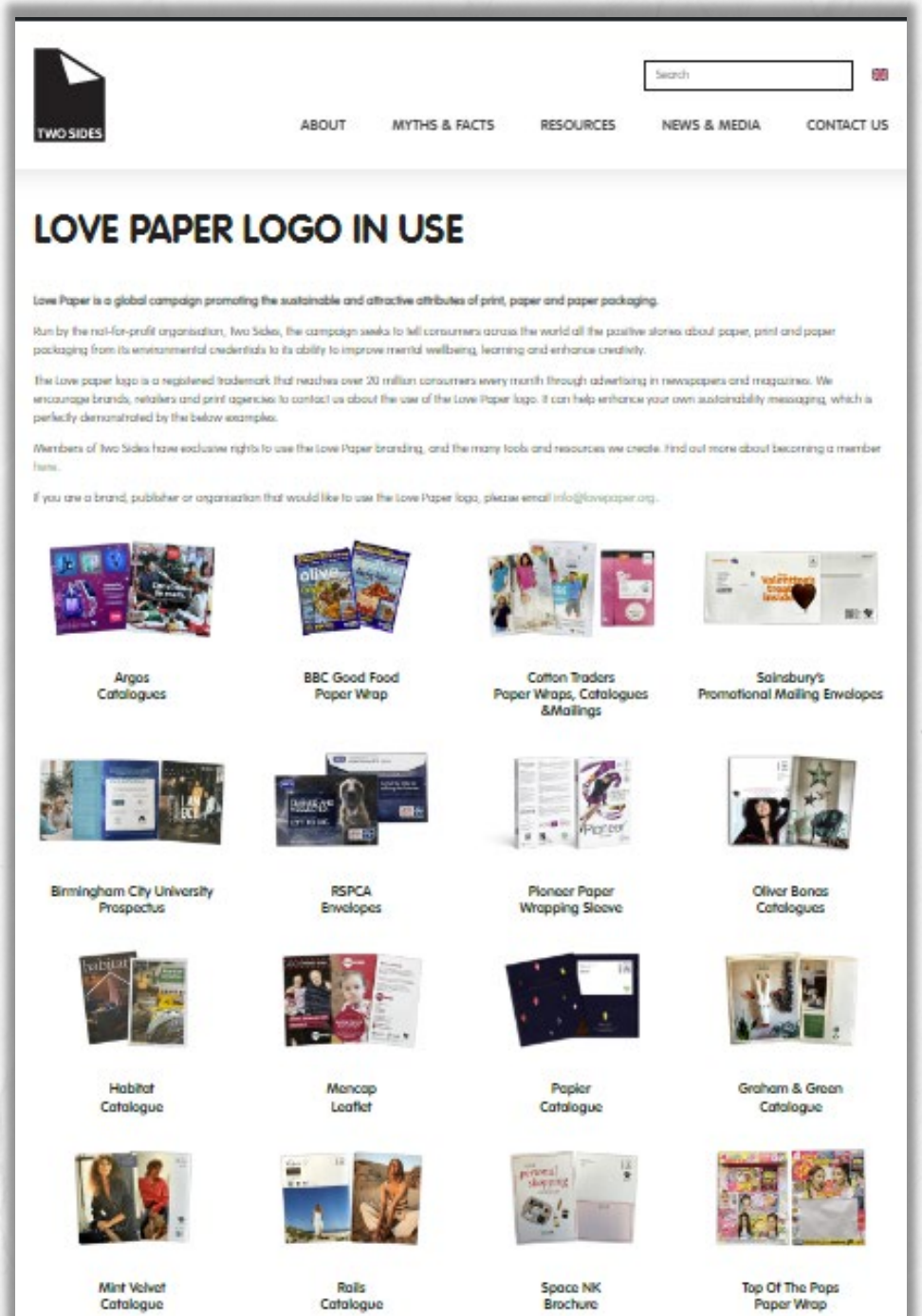

# Helping Brands tell the sustainable story of their paper use

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









# Love Paper can support the story that brands want to tell about their sustainable packaging










PAPER PACKAGING®
www.lovepaper.org

KARTON PACKAGING®
www.lovepaper.org

CARD BOARD®
www.lovepaper.org

CORRUGATED PACKAGING®
www.lovepaper.org

PAPER CUPS®
www.lovepaper.org

PAPER BOARD®
www.lovepaper.org

# Example of Love Paper in use Italy

Engagement with graphic schools and Universities to talk about the sustainability of paper and a future in the industry




Design & communication competition creating promotional adverts






# AMA LA CARTA – LOVE PAPER

*Chi Vive del bosco, lo protegge! Cosi fa anche la carta*

Whoever lives in the forest protects it! So does paper.







**October'24**

More than 260 posters in all the stops of Milan Metro for 15 days

Call to action is to Love Paper Italy Website

Looking for budget to do this in Rome 2025




LOVE
PAPER
WEEK
3rd - 7th Feb 2025
lovepaper.info/lovepaperweek

# Love Paper Week 3rd - 7th Feb 2025

Love Paper Week – A global initiative for the industry to collectively champion paper, sustainability and attractiveness, to consumers and business.

Simple assets and resources, communicated widely, for the industry to use through social media and other individual company communications.

Year 1, modest activity but growing year on year to be a truly recognised week.

Mobilise everyone in the world of paper to celebrate Love Paper Week. From direct mail and sack paper to corrugated board.

LOVE PAPER WEEK
3rd - 7th Feb 2025
lovepaper.info/lovepaperweek

LOVE PAPER WEEK
3rd - 7th Feb 2025
lovepaper.info/lovepaperweek

# Love Paper Week Activity

## Timeline:

- w/c 6th January:
  Landing page live Newsletters sent out on Love Paper Week.
- w/c 3rd February:
  Love Paper Week live! Content going out on social media every day that week.
  #lovepaperweek
- w/c 10th March:
  Report created on engagement and results.










LOVE PAPER WEEK
3rd - 7th Feb 2025
lovepaper.info/lovepaperweek

LOVE PAPER WEEK
3rd - 7th Feb 2025
lovepaper.info/lovepaperweek

# Love Paper Week

We ask you to please get involved and support Love Paper Week by using these marketing communications and resources on your social media, emails and online calls, to help inform consumers on why paper is a sustainable, effective and attractive medium.

If you have any questions about Love Paper Week or the assets available, let us know.

[lovepaper.org/lovepaperweek](lovepaper.org/lovepaperweek)





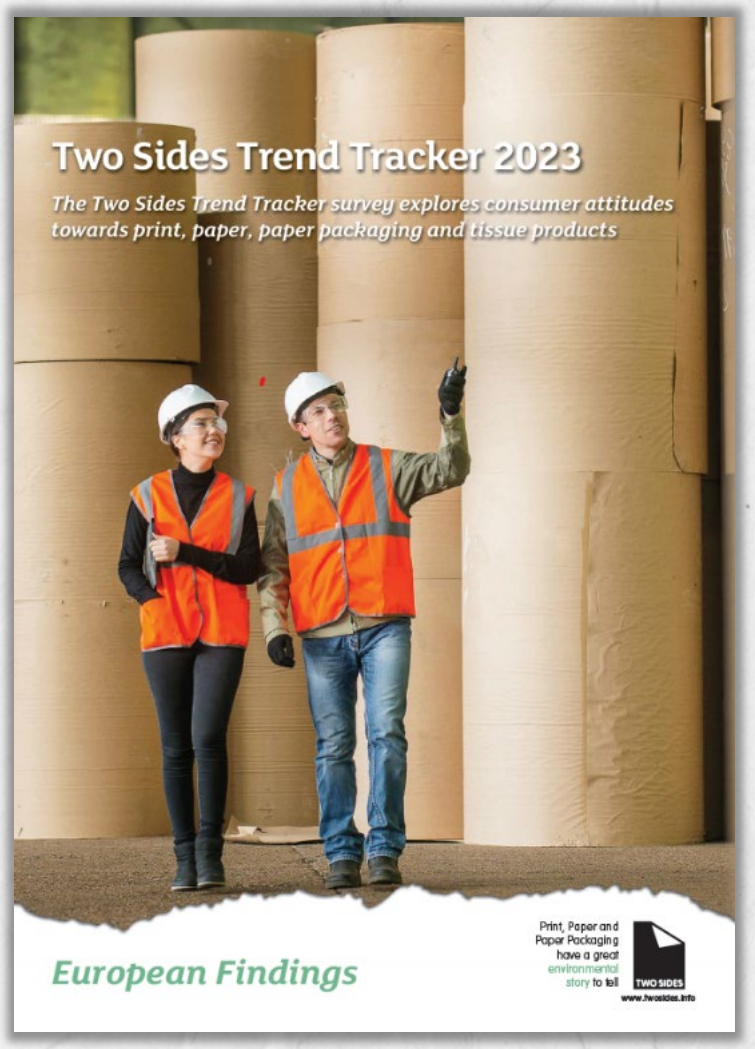
# Trend Tracker Survey

# Providing Facts To The Industry

Trend Tracker research published every 2 years

To explore and understand changing consumer preferences, perceptions, and attitudes towards print, paper and paper packaging

- Environmental Perceptions
- Reading Habits
- Packaging Preferences
- Attitudes towards Tissue Products




## Next survey to be published May 2025

Global study of over 10,000 consumers by independent research company **Toluna**

**Europe:** Austria, Belgium, Denmark, Finland, France, Germany, Italy, Norway, Sweden, UK

**Globally:** Argentina, Australia, Brazil, Canada, New Zealand, North America, South Africa

# The Complete Data

The full analysis will be available **only to members** at European and Country level in PowerPoint.

Broken down by:

- Country
- Age
- Gender

## Contents


**P5. European Findings**
6. Reading Habits
38. Environmental Perceptions
61. Packaging Preferences
81. Tissue Products

**P94. Argentina Findings**
95. Reading Habits
110. Environmental Perceptions
129. Packaging Preferences
144. Tissue Products

**P148. Austria Findings**
149. Reading Habits
164. Environmental Perceptions
183. Packaging Preferences
199. Tissue Products

**P204. Belgium Findings**
205. Reading Habits
224. Environmental Perceptions
249. Packaging Preferences
271. Tissue Products

**P280. Brazil Findings**
281. Reading Habits
301. Environmental Perceptions
326. Packaging Preferences
349. Tissue Products

**P354. Chile Findings**
355. Reading Habits
371. Environmental Perceptions
390. Packaging Preferences
406. Tissue Products

**P411. Denmark Findings**
412. Reading Habits
423. Environmental Perceptions
447. Packaging Preferences
463. Tissue Products

**P468. Finland Findings**
469. Reading Habits
485. Environmental Perceptions
503. Packaging Preferences
519. Tissue Products

**P524. France Findings**
525. Reading Habits
541. Environmental Perceptions
559. Packaging Preferences
575. Tissue Products

**P580. Germany Findings**
581. Reading Habits
597. Environmental Perceptions
616. Packaging Preferences
632. Tissue Products

**P637. Italy Findings**
638. Reading Habits
654. Environmental Perceptions
673. Packaging Preferences
689. Tissue Products

**P694. Norway Findings**
695. Reading Habits
711. Environmental Perceptions
730. Packaging Preferences
746. Tissue Products

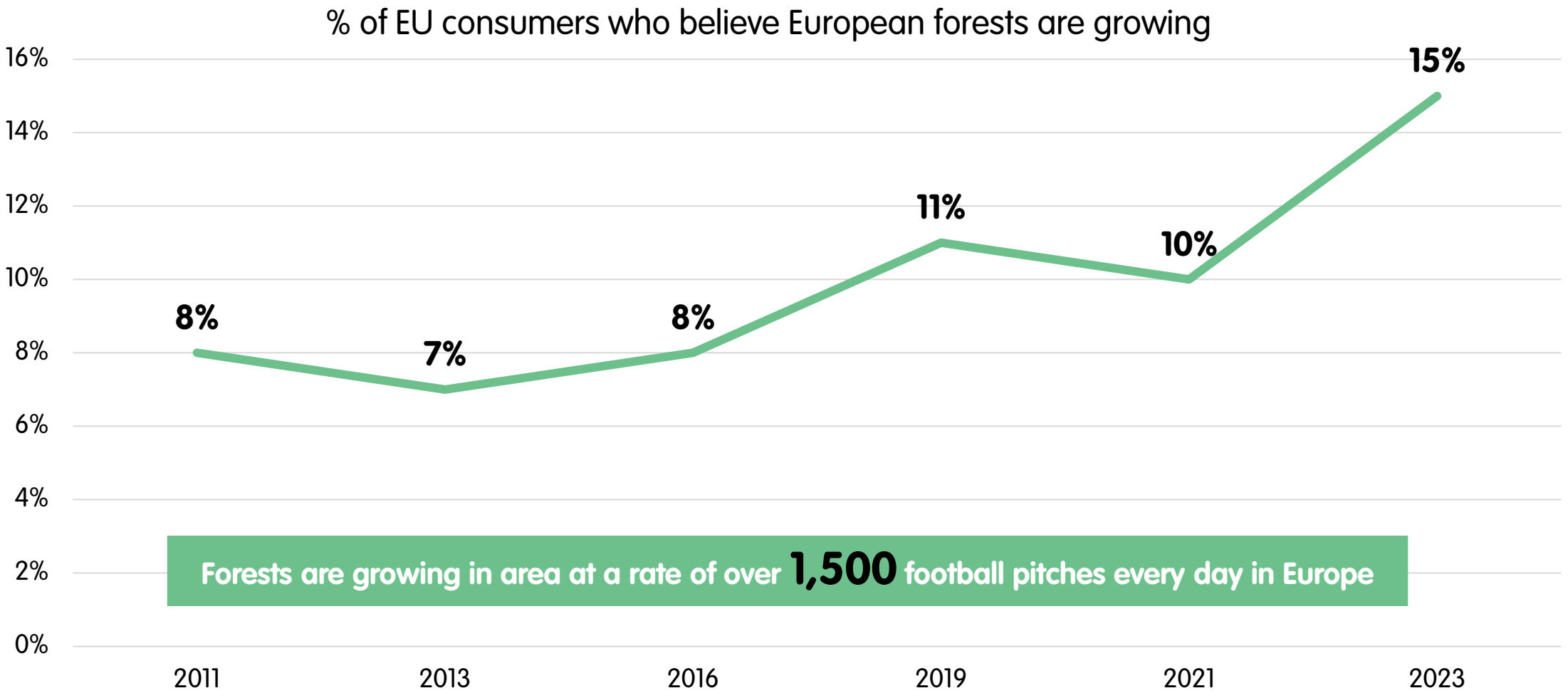
**P751. South Africa Findings**
752. Reading Habits
768. Environmental Perceptions
787. Packaging Preferences

**P805. Sweden Findings**
806. Reading Habits
822. Environmental Perceptions
841. Packaging Preferences
857. Tissue Products

**P862. UK Findings**
863. Reading Habits
879. Environmental Perceptions
898. Packaging Preferences
914. Tissue Products

**P919. U.S. Findings**
920. Reading Habits
940. Environmental Perceptions
965. Packaging Preferences
987. Tissue Products

# What do you believe has been happening to the size of European forest area since the year 2000?



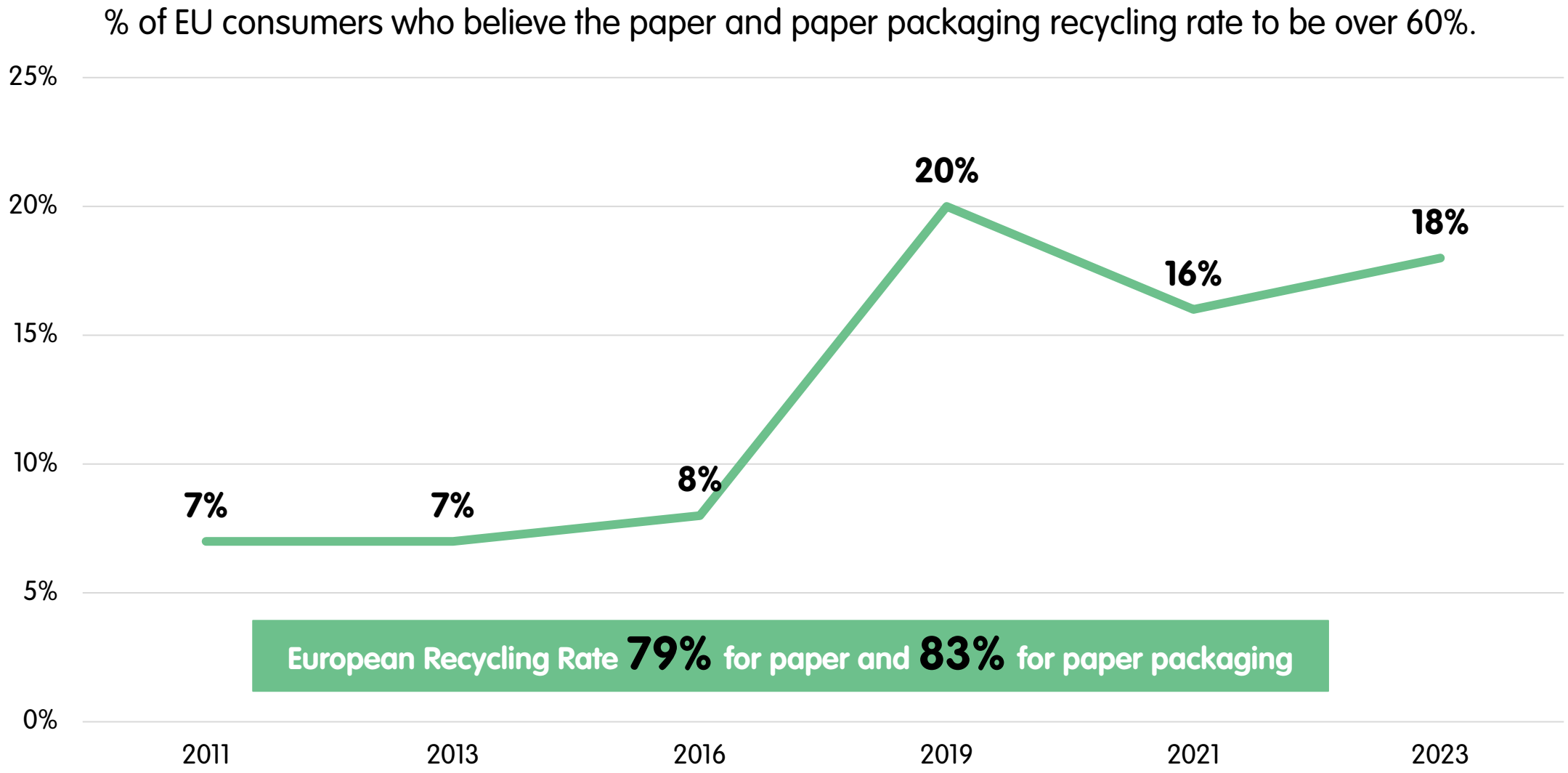





© Two Sides Ltd 2023

# What percentage do you think is recycled in Europe?







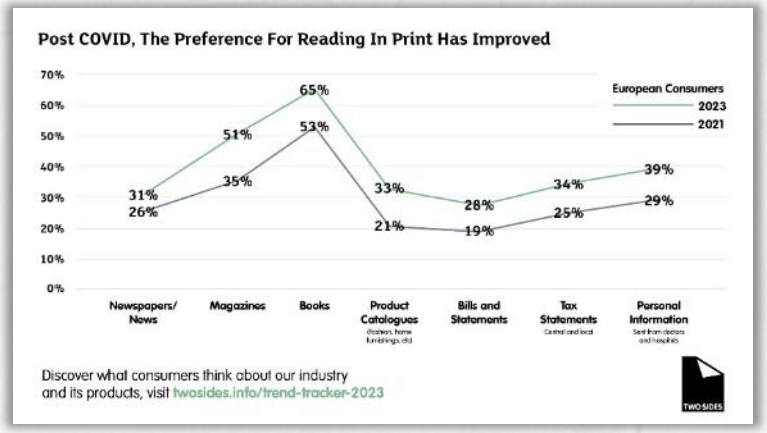

© Two Sides Ltd 2023

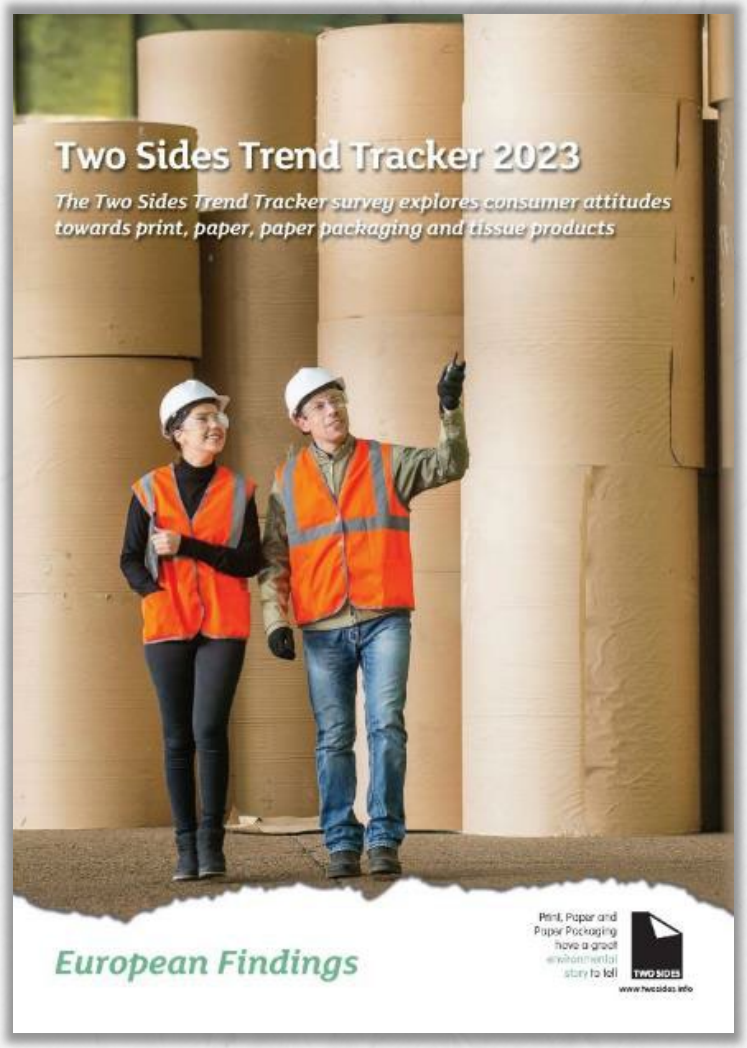
# Trend Tracker – Resources

## Reports to be published in June 2025

- 4-page Key headline summary publicly available in English, French, German and Italian
- 16-page Executive report, English, exclusively for members (or for purchase @ €849)
- Detailed PowerPoint report exclusively for members
- Factographics for social media (co-branded for members)



# Trend Tracker 2025 Communications

European **synopsis** report to be published in June 2025 in English, French, German and Italian.

North America and South America reports will also be available

Press releases, over a number of months on the key findings throughout Two Sides countries;

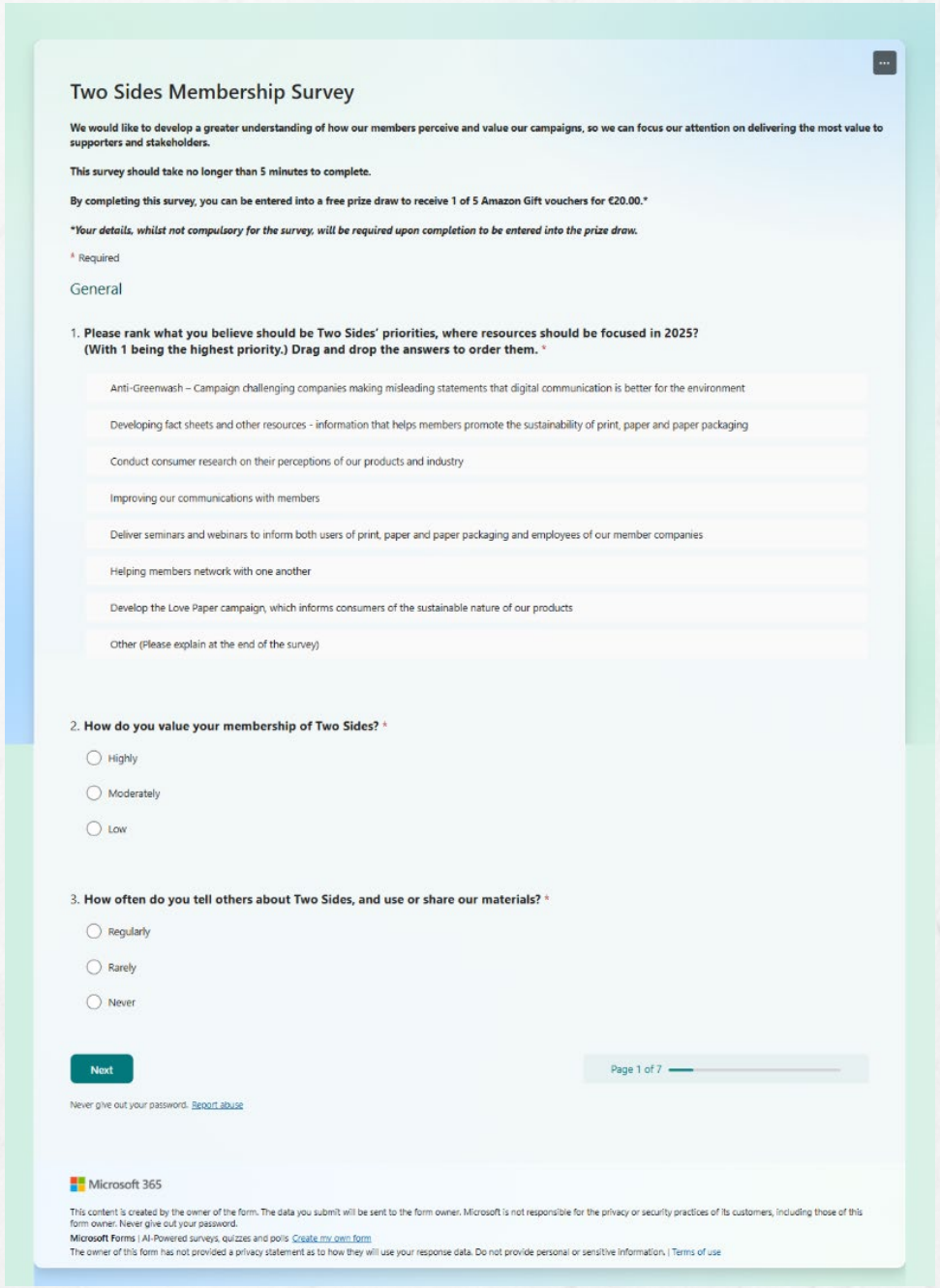
1. Environmental Findings – w/c: 26th May 2025
2. Reading Habits – w/c: 16th June 2025
3. Packaging Findings – w/c: 7th July 2025
4. Reading Habits (2) – w/c: 28th July 2025
5. Environmental Findings (2) - w/c: 18th August 2025
6. Packaging Findings (2) – w/c: 8th September 2025

**Partner/member webinar 10th June 2025**



# Members Survey

- We would like to develop a greater understanding of how our members perceive and value our campaigns, so we can focus our attention on delivering the most value to supporters and stakeholders.
- Quick and easy - should take no longer than 5 minutes to complete.
- You can be entered into a free prize draw to win 1 of 5 €20 Amazon vouchers
- Results will be shared with members



Two Sides Membership Survey

**We would like to develop a greater understanding of how our members perceive and value our campaigns, so we can focus our attention on delivering the most value to supporters and stakeholders.**

**This survey should take no longer than 5 minutes to complete.**

**By completing this survey, you can be entered into a free prize draw to receive 1 of 5 Amazon Gift vouchers for €20.00.***

***Your details, whilst not compulsory for the survey, will be required upon completion to be entered into the prize draw.***

* Required

General

1. **Please rank what you believe should be Two Sides' priorities, where resources should be focused in 2025? (With 1 being the highest priority.) Drag and drop the answers to order them.** *

Anti-Greenwash – Campaign challenging companies making misleading statements that digital communication is better for the environment

Developing fact sheets and other resources - information that helps members promote the sustainability of print, paper and paper packaging

Conduct consumer research on their perceptions of our products and industry

Improving our communications with members

Deliver seminars and webinars to inform both users of print, paper and paper packaging and employees of our member companies

Helping members network with one another

Develop the Love Paper campaign, which informs consumers of the sustainable nature of our products

Other (Please explain at the end of the survey)

2. **How do you value your membership of Two Sides?** *

- Highly
- Moderately
- Low

3. **How often do you tell others about Two Sides, and use or share our materials?** *

- Regularly
- Rarely
- Never

Next

Page 1 of 7

Never give out your password. Report abuse

Microsoft 365

This content is created by the owner of the form. The data you submit will be sent to the form owner. Microsoft is not responsible for the privacy or security practices of its customers, including those of this form owner. Never give out your password.

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# Andrea Boltho

Director of Oxford Economics at Oxford University

**"Where is the European Economy Going? More uncertainties than ever"**






**Please ask questions through the Q&A function**

We will have 5-10 minutes at the end of Andrea's session





# Member Resources

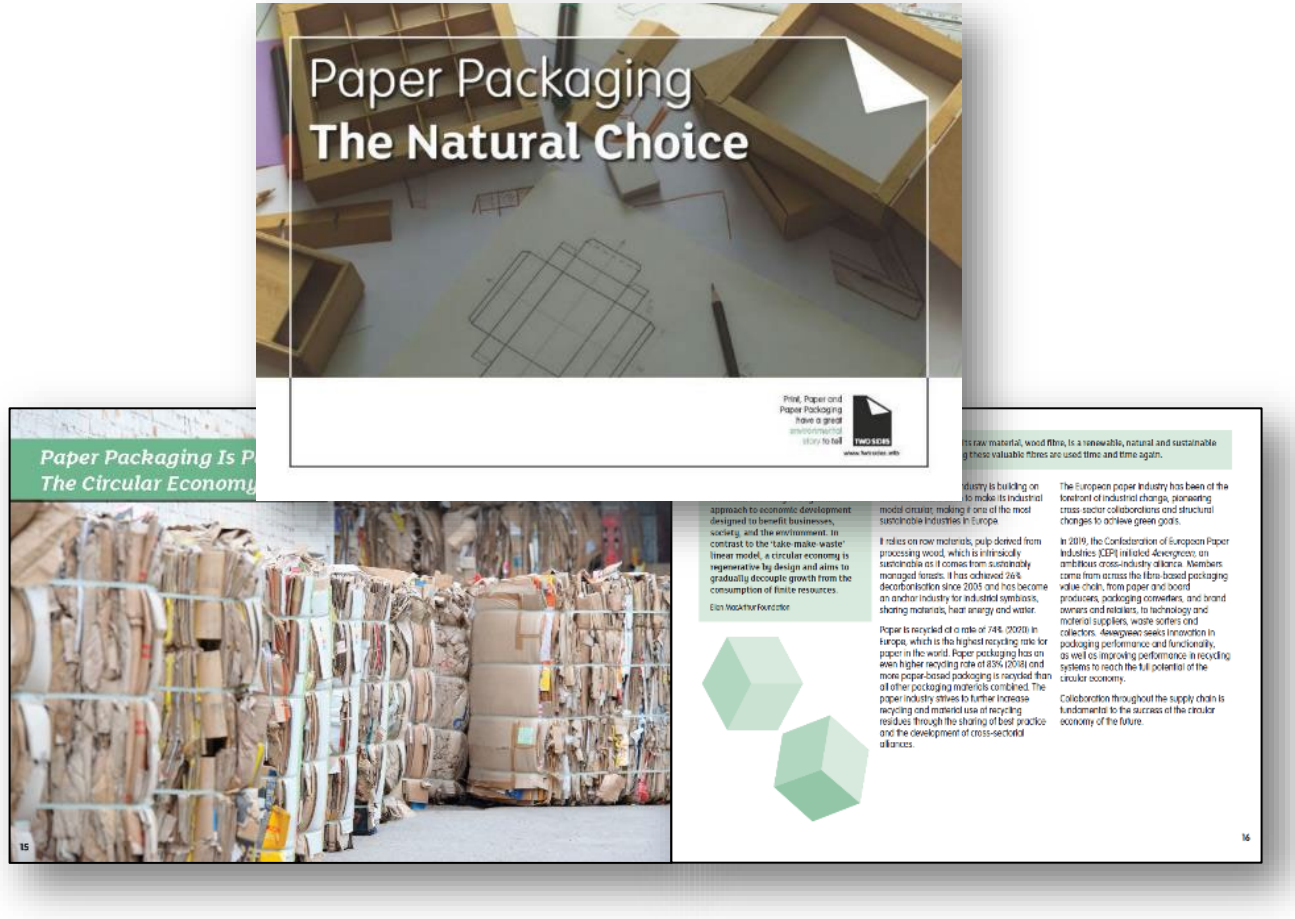
Information, tools and events
available to our members

# Marketing Materials And Tools

## Myths & Facts Booklet




## Packaging Facts Booklet



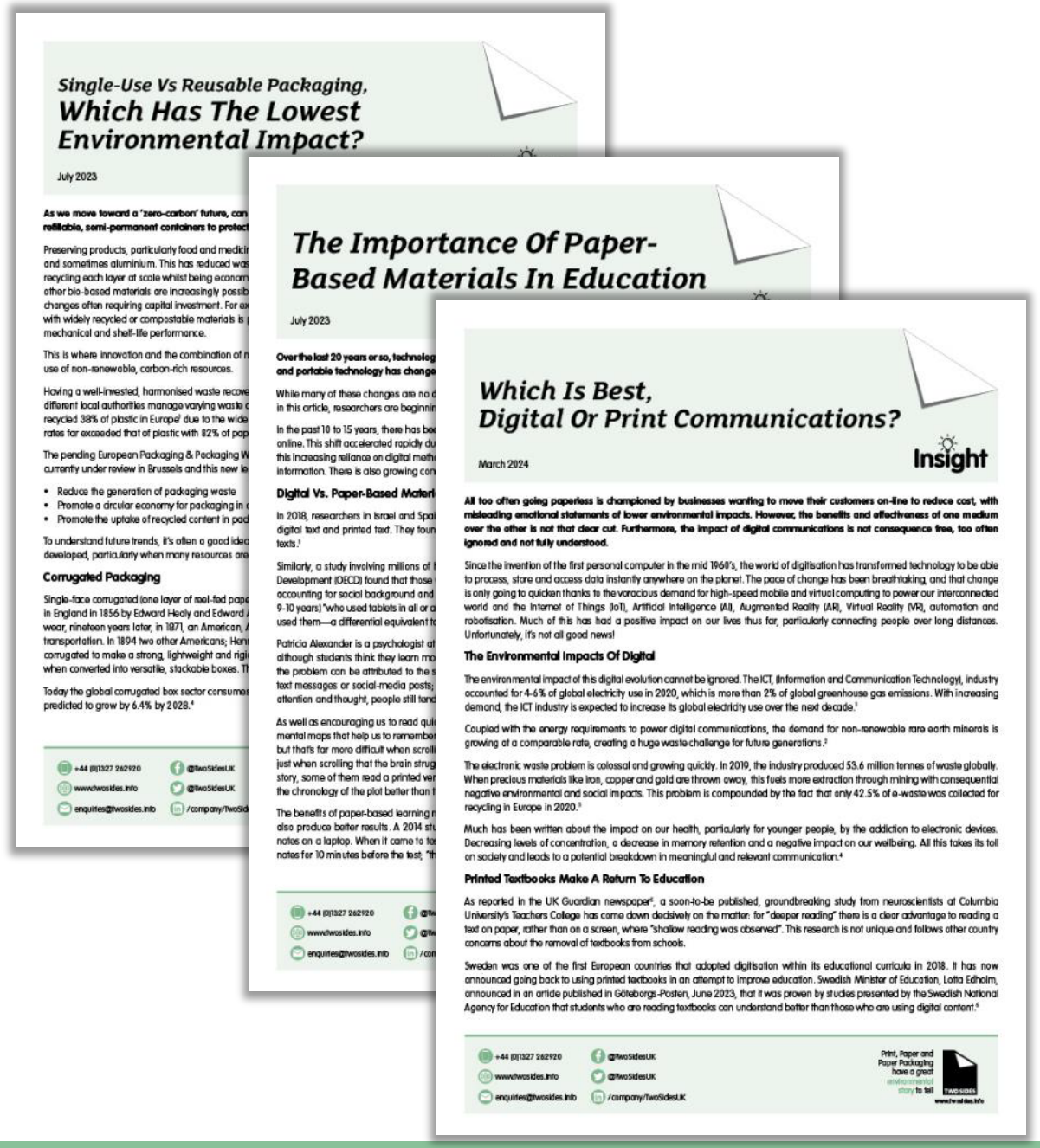
# Fact Sheets

1. Paper Packaging, The Natural Choice
2. Paper Bags, The Natural Choice
3. Paper Production & Sustainable Forests
4. Paper Recovery & Recycling
5. Forest Benefits & Biodiversity
6. Renewable Energy & Carbon Footprint
7. Paper's Water Footprint
8. The Impacts of Greenwash
9. What's More Hygienic; Hand Dryers or Paper Towels



# Insight Articles

- Alternative Email Footers
- Paper From Alternative Fibres
- Tissue Made From Trees
- Single-use & Reusable Packaging
- The Importance Of Paper-based Materials In Education
- Which Is Best, Print or Digital?
- Regulatory Overview, Print & Paper



# Factographics And Mini Videos

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





















# Can Be Personalised For Members And Supporters



















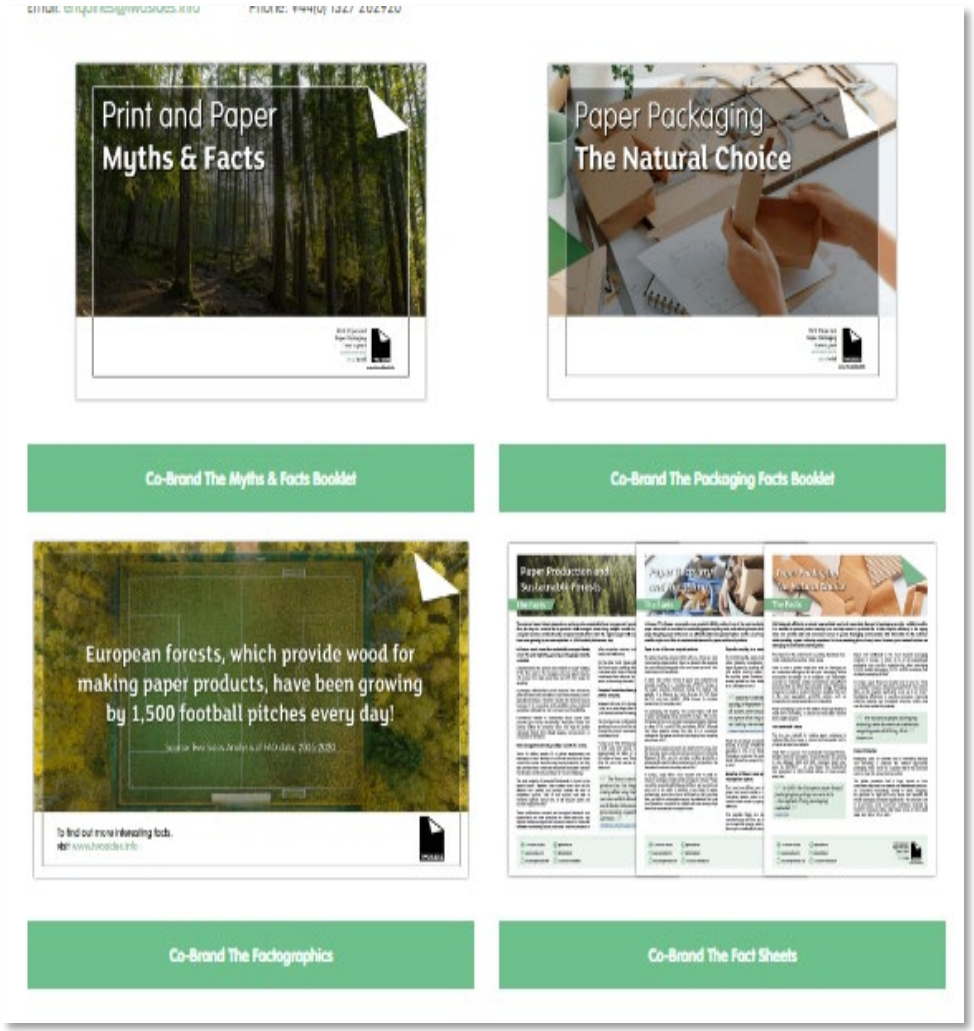








# Member Co-Branding Process







Two Sides Member Co-Branding Process

# Social Media Package For Members

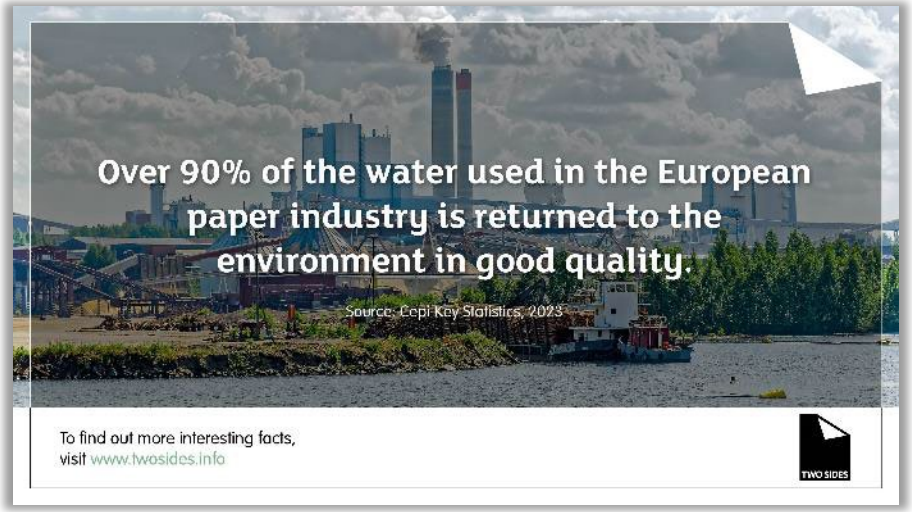
Two Sides Social Media - Member Content Plan

Suggest our members post 1 of these every 2 months to their social media channels to help further support Two Sides
If you are already using co-branded Two Sides factographics/videos, please cary on doing so instead.

| | Suggested Text | Graphic/Video | URL |
|---|---|---|---|
| 1 | Paper is based on wood, a natural and renewable material. Paper is one of the most recycled products in the world and epitomises the circular economy model of make, use, recycle and reuse.<br><br>In 2022, a total of 55 million tonnes of paper was collected and recycled in Europe, reulsting in a recycling rate of 71%. | European recycling rate 71%.mp4 | https://twosides.info/sustainable-products/ |
| 2 | In Europe, where almost all primary forests are protected, paper comes from sustainably managed forests where the cycle of planting, growing and logging is carefully controlled.<br><br>Forests cover 40% of the European territory and are growing in both area and volume. | Euroean forests grew by 58,390km2.mp4 | https://twosides.info/european-forests/ |
| 3 | The European pulp and paper industry produces original biobased products using wood, a renewable material. It is also the largest single industrial user and producer of renewable energy in the EU.<br><br>The paper industry's carbon emissions have reduced by 50% per tonne of product from 1990 to 2022.The European pulp and paper industry is also the biggest single user and producer of renewable energy in Europe, with 61% of its primary energy consumption coming from renewable sources. | 61% of energy is renewable.mp4 | https://twosides.info/renewable-energy/ |
| 4 | Demand for sustainable packaging has never been greater. Paper packaging is not only the most recycled packaging material in Europe, it also utilises an exceptionally high amount of recycled material in its production.<br><br>In 2020, 82% of all paper-based packaging was recycled, outperforming glass packaging (76%), metallic packaging (76%), and far exceeding that of plastic packaging (38%). | 82% paper packaging recycled.mp4 | https://twosides.info/paper-packaging-is-recycled-more-than-any-other-material |
| | Without new virgin fibres from trees, the paper cycle cannot be maintained. | | |

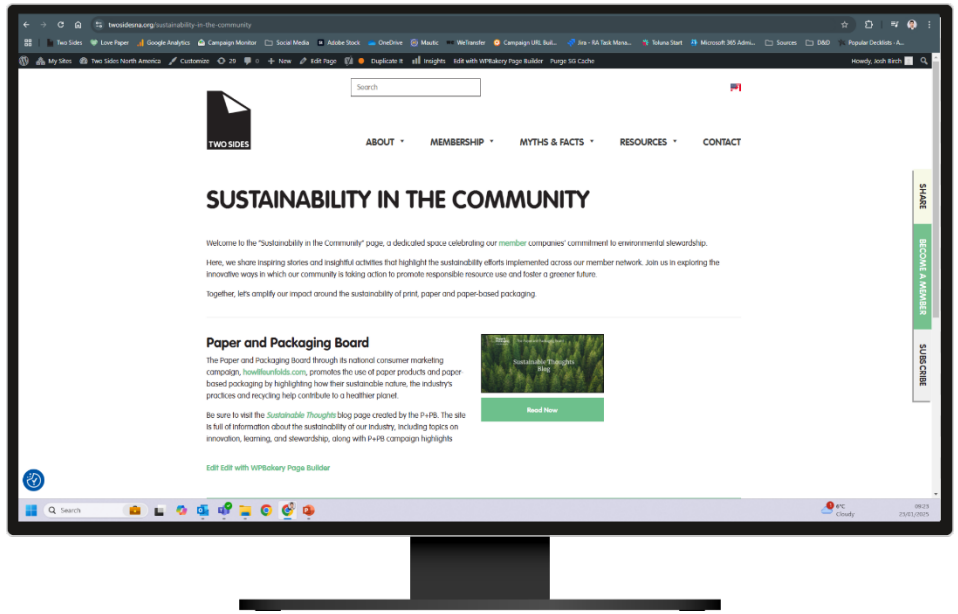
A simple social media package for our members and supporters to follow:

- 10 social post ideas, including text, video/graphic and URL link.
- Variety of industry related messages
- Suggest using 1 every 1-2 months



# NEW - Sustainability In The Community

- New page on our website for members to promote sustainable innovation/campaigns/stories.
- Will also be included as an item within Two Sides Newsletters which reaches 12,000 people
- MUST be environmental news/sustainability initiatives.
- Please send news and pictures to enquiries@twosides.info with the subject:
  **For Sustainability In the Community**

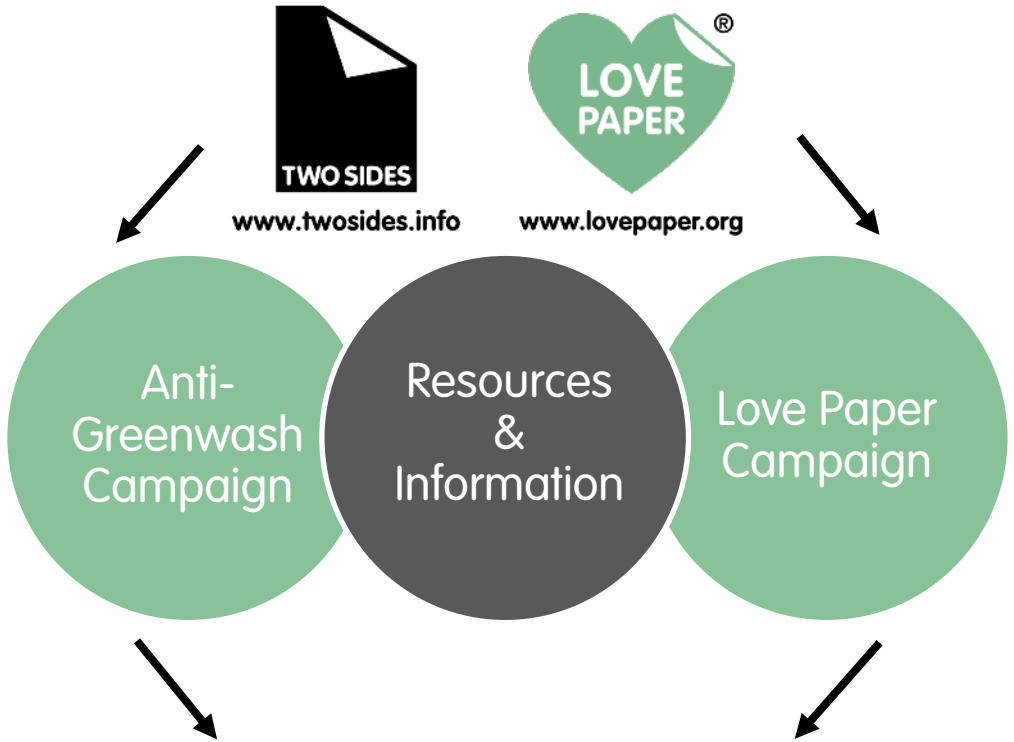



Communications

# Communications Strategy

## Business Professionals Focus

11 Language websites
120,000 visitors p.a.
Regular e-newsletters
Active on Social Media:
LinkedIn
Facebook
X (Twitter)




180,000 Website Visitors
20+ million Social Media Reach (annually)

## Consumers Focus

6 language websites
60,000 visitors p.a.
Regular e-newsletters
Active on Social Media:
Facebook
Instagram
X (Twitter)
TikTok

# Campaign Update

Europe version published twice a year in English & German

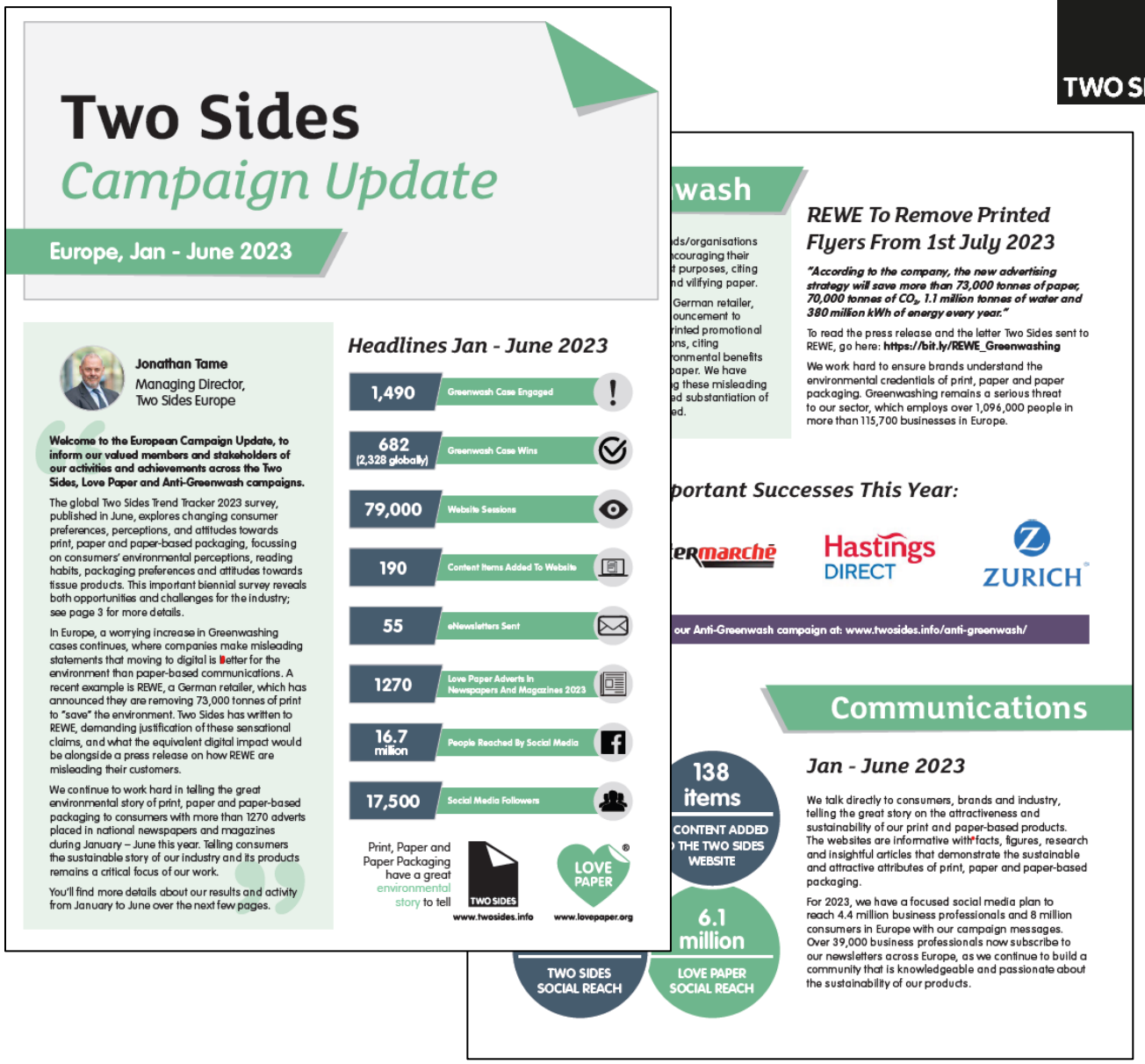
4-page A4

Highlight key results from campaigns:

- Greenwash
- Love Paper
- Marketing activities

Keeping our members informed

[www.twosides.info/campaign-update](www.twosides.info/campaign-update)



Two Sides

Campaign Update

Europe, Jan - June 2023

Jonathan Tame
Managing Director,
Two Sides Europe

**Welcome to the European Campaign Update, to inform our valued members and stakeholders of our activities and achievements across the Two Sides, Love Paper and Anti-Greenwash campaigns.**

The global Two Sides Trend Tracker 2023 survey, published in June, explores changing consumer preferences, perceptions, and attitudes towards print, paper and paper-based packaging, focussing on consumers' environmental perceptions, reading habits, packaging preferences and attitudes towards tissue products. This important biennial survey reveals both opportunities and challenges for the industry; see page 3 for more details.

In Europe, a worrying increase in Greenwashing cases continues, where companies make misleading statements that moving to digital is better for the environment than paper-based communications. A recent example is REWE, a German retailer, which has announced they are removing 73,000 tonnes of print to "save" the environment. Two Sides has written to REWE, demanding justification of these sensational claims, and what the equivalent digital impact would be alongside a press release on how REWE are misleading their customers.

We continue to work hard in telling the great environmental story of print, paper and paper-based packaging to consumers with more than 1270 adverts placed in national newspapers and magazines during January – June this year. Telling consumers the sustainable story of our industry and its products remains a critical focus of our work.

You'll find more details about our results and activity from January to June over the next few pages.

*Headlines Jan - June 2023*

| | |
|---|---|
| 1,490 | Greenwash Case Engaged |
| 682 (2,328 globally) | Greenwash Case Wins |
| 79,000 | Website Sessions |
| 190 | Content Items Added To Website |
| 55 | eNewsletters Sent |
| 1270 | Love Paper Adverts In Newspapers And Magazines 2023 |
| 16.7 million | People Reached By Social Media |
| 17,500 | Social Media Followers |

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

TWO SIDES www.twosides.info

LOVE PAPER www.lovepaper.org

wash

*REWE To Remove Printed Flyers From 1st July 2023*

***"According to the company, the new advertising strategy will save more than 73,000 tonnes of paper, 70,000 tonnes of $CO_2$, 1.1 million tonnes of water and 380 million kWh of energy every year."***

To read the press release and the letter Two Sides sent to REWE, go here: **https://bit.ly/REWE_Greenwashing**

We work hard to ensure brands understand the environmental credentials of print, paper and paper packaging. Greenwashing remains a serious threat to our sector, which employs over 1,096,000 people in more than 115,700 businesses in Europe.

*portant Successes This Year:*

Hastings DIRECT

ZURICH

our Anti-Greenwash campaign at: www.twosides.info/anti-greenwash/

Communications

*Jan - June 2023*

138 items CONTENT ADDED TO THE TWO SIDES WEBSITE

We talk directly to consumers, brands and industry, telling the great story on the attractiveness and sustainability of our print and paper-based products. The websites are informative with facts, figures, research and insightful articles that demonstrate the sustainable and attractive attributes of print, paper and paper-based packaging.

For 2023, we have a focused social media plan to reach 4.4 million business professionals and 8 million consumers in Europe with our campaign messages. Over 39,000 business professionals now subscribe to our newsletters across Europe, as we continue to build a community that is knowledgeable and passionate about the sustainability of our products.

6.1 million

TWO SIDES SOCIAL REACH

LOVE PAPER SOCIAL REACH

# The Page

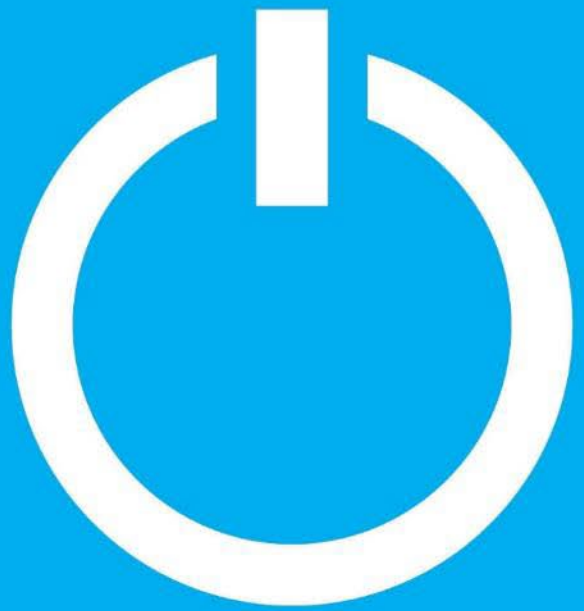
TWO SIDES
www.twosides.info

## 'Micro-mag' published 3 times a year in the UK

- Content covering the effectiveness and sustainability of print media and packaging
- Facts, Information, News and Innovation
- Members can use content
- Printed copies available on request

Subscribe: twosides.info/the-page

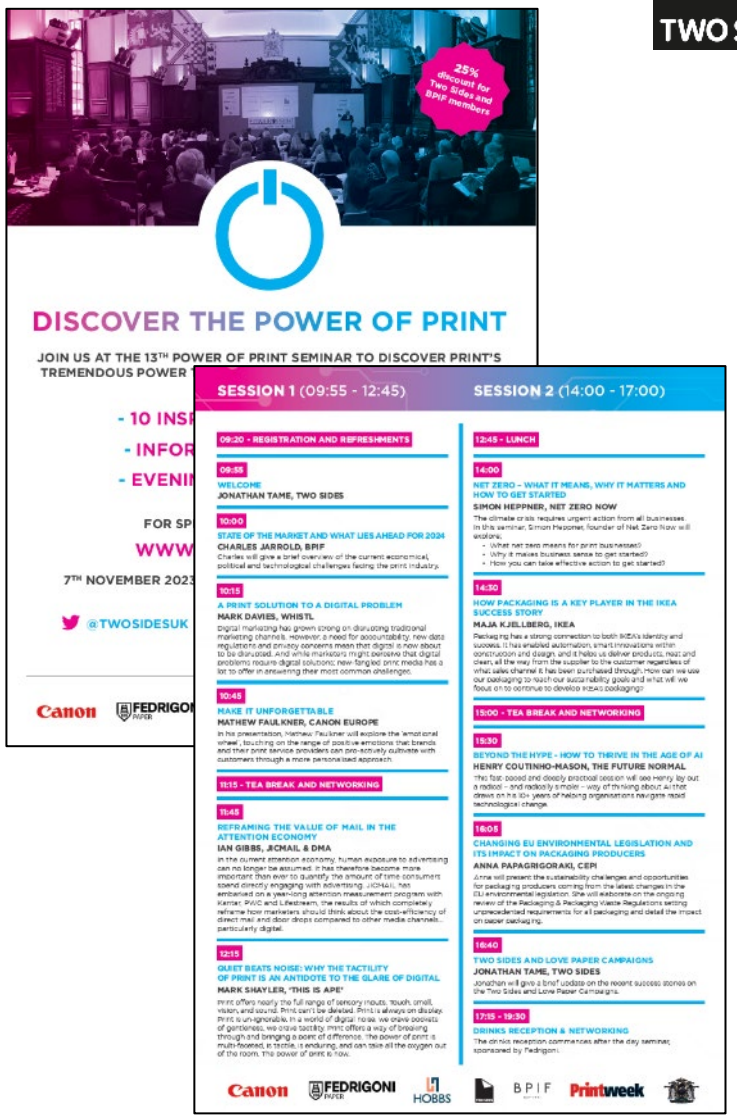




# POWER OF PRINT

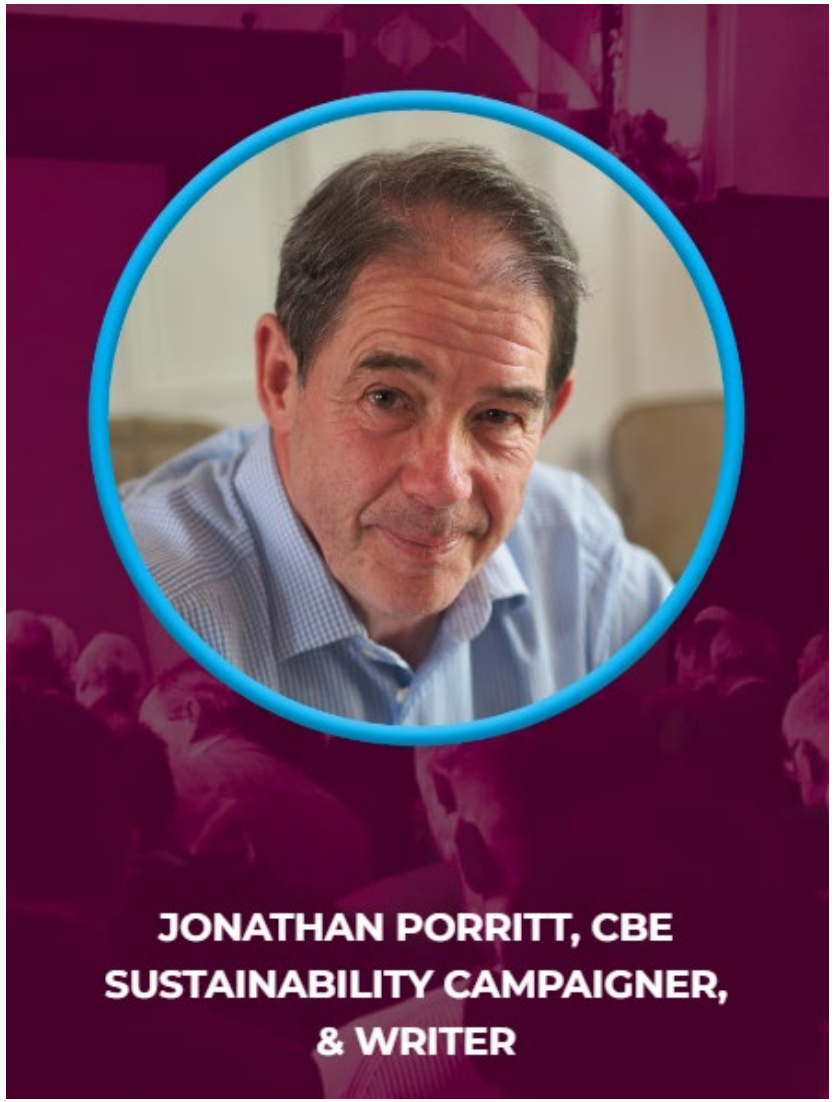
# Power of Print – London - Tuesday 5th November 2024




- 171 attendees
- Audio recording and presentations of all speakers are available
- Date Reserved Tuesday 4th November 2025

# Jonathon Porritt




## The Economic Impacts of the Climate Crisis

https://twosides.info/uk/power-of-print-2024-jonathon-porritt-green-futures

All speaker slides and audio recordings can be found here: https://twosides.info/power-of-print-2024

TWO SIDES

# POWER OF PRINT

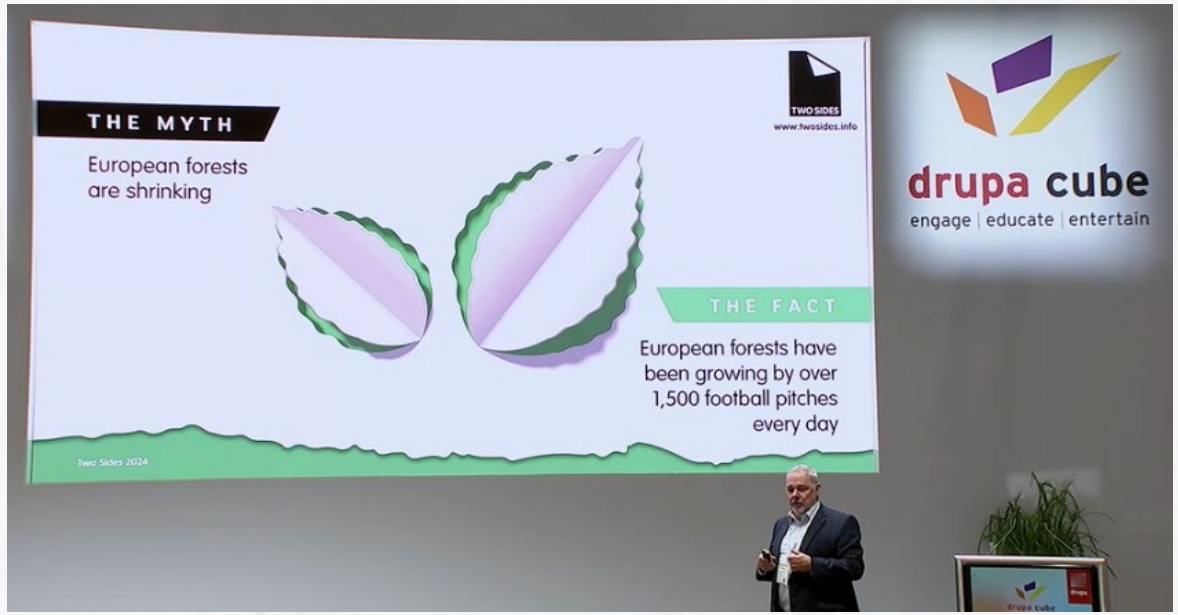
Save the date!

## Tuesday 4th November 2025

Stationers' Hall, London

# We Can Help With Events And Training

TWO SIDES





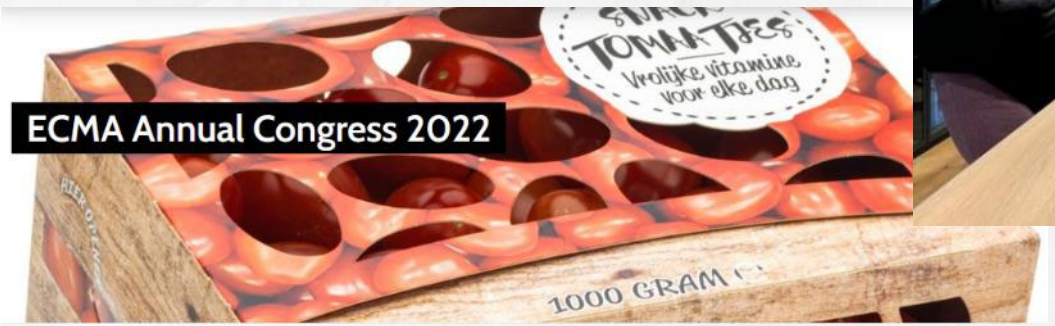





THE Print Show
NEC BIRMINGHAM | HALL 17 | SEPTEMBER 20-22 | 2022



ECMA CONGRESS
Krakow, Poland
15 & 16 September 2022




webinar
Discover Forests, Sustainability and Paper

THE NAVIGATOR COMPANY
Sponsored by DISCOVERY Eco-efficient Paper

TWO SIDES
www.twosides.info

LOVE PAPER
www.lovepaper.org


Membership

# Attracting New Members

## The industry needs to support the campaign






# Two Sides Strategy 2025

**Greenwash:** Continue to tackle, misleading anti print and paper statements.

**Love Paper:** Strengthen engagement with publishers and secure more adverts. Develop social media and digital channels.

**Tools and Resources:** Update of all our materials. Continuing personalisation and promotion of all Two Sides resources, Myths and Facts, Fact Sheets, Videos…

**Communications:**

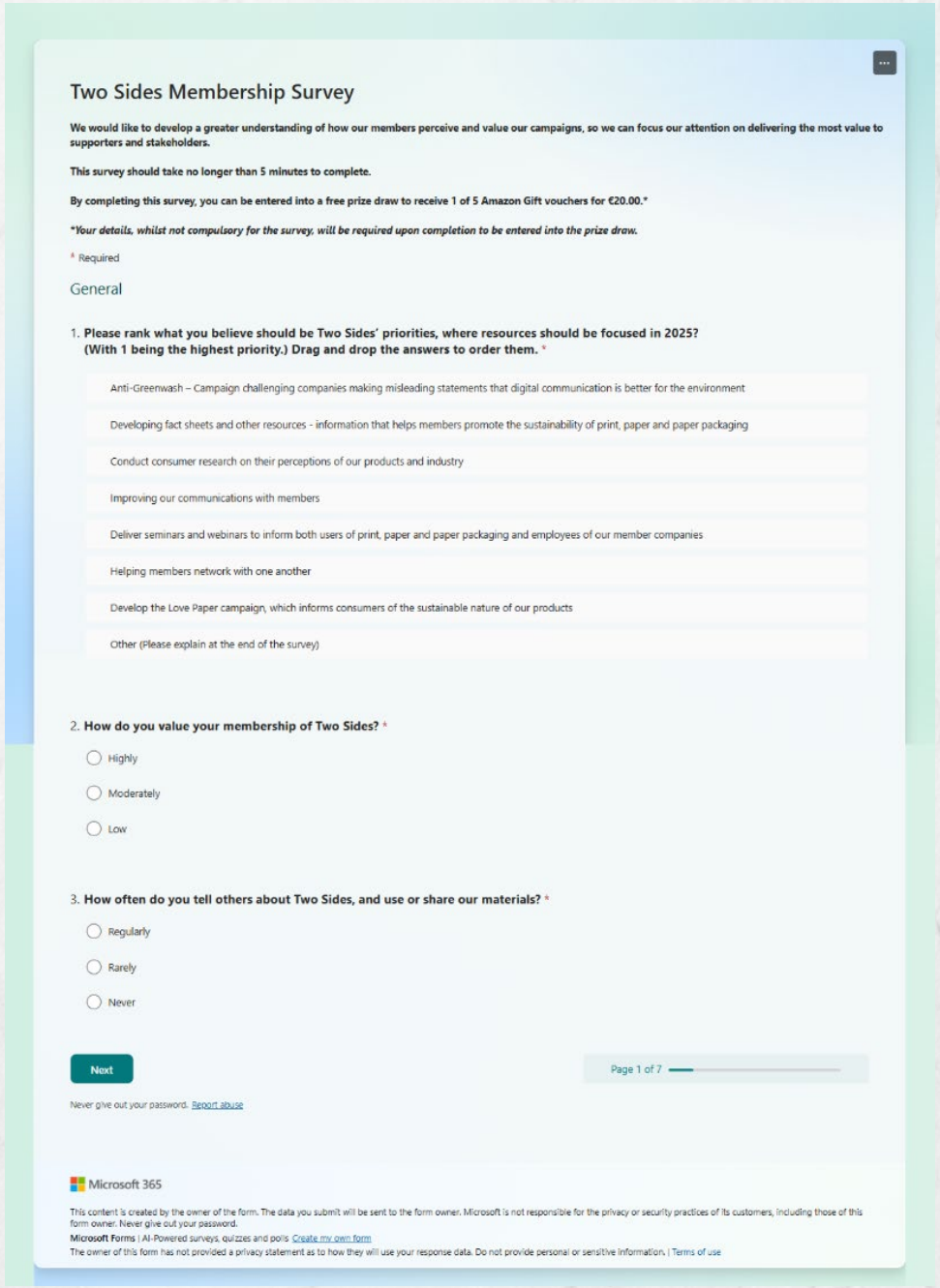
- Database growth, E-newsletters, Social Media engage
- Regular members communication – The Page and Campaign updates

**Grow membership:** Increase number of organisations using our messages.

**Working together** **to tell the great story about our industry and products**

# Members Survey

- We would like to develop a greater understanding of how our members perceive and value our campaigns, so we can focus our attention on delivering the most value to supporters and stakeholders.
- Quick and easy - should take no longer than 5 minutes to complete.
- You can be entered into a free prize draw to win 1 of 5 €20 Amazon vouchers
- Results will be shared with members



Two Sides Membership Survey

**We would like to develop a greater understanding of how our members perceive and value our campaigns, so we can focus our attention on delivering the most value to supporters and stakeholders.**

**This survey should take no longer than 5 minutes to complete.**

**By completing this survey, you can be entered into a free prize draw to receive 1 of 5 Amazon Gift vouchers for €20.00.***

***Your details, whilst not compulsory for the survey, will be required upon completion to be entered into the prize draw.***

* Required

General

1. **Please rank what you believe should be Two Sides' priorities, where resources should be focused in 2025? (With 1 being the highest priority.) Drag and drop the answers to order them.** *

Anti-Greenwash – Campaign challenging companies making misleading statements that digital communication is better for the environment

Developing fact sheets and other resources - information that helps members promote the sustainability of print, paper and paper packaging

Conduct consumer research on their perceptions of our products and industry

Improving our communications with members

Deliver seminars and webinars to inform both users of print, paper and paper packaging and employees of our member companies

Helping members network with one another

Develop the Love Paper campaign, which informs consumers of the sustainable nature of our products

Other (Please explain at the end of the survey)

2. **How do you value your membership of Two Sides?** *

- Highly
- Moderately
- Low

3. **How often do you tell others about Two Sides, and use or share our materials?** *

- Regularly
- Rarely
- Never

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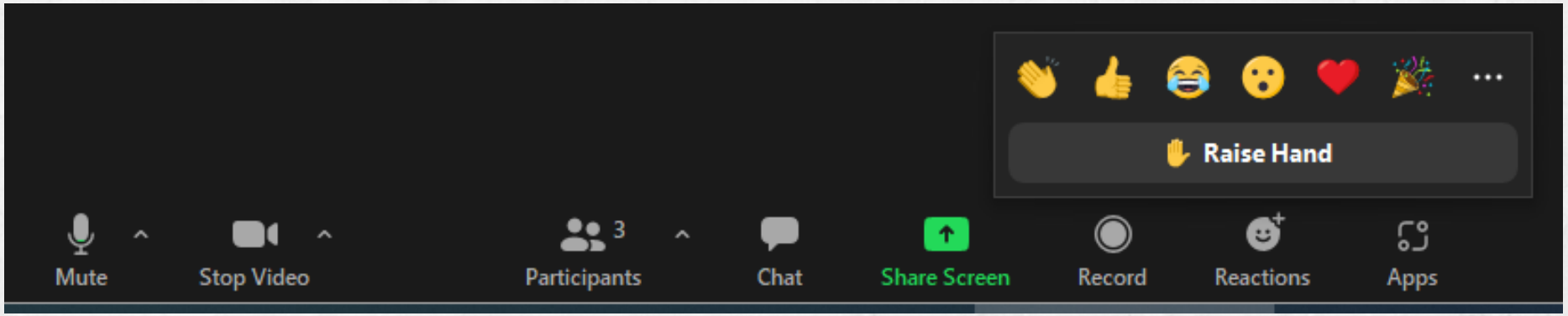
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# Discussions & Questions




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