



# The great paper debate

// Myths, facts, and what paper means for the future of packaging

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 **BIG Ideas**  
hosted by Amcor



# Your presenters today



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R&D Manager



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Sustainability Manager



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Snacks & Confectionery  
Sales and Marketing Director

# Amcor at a glance

## At home in homes around the world



~ 70,000 colleagues

~ 400 locations across 140+ countries

## What we make



- Flexible packaging (plastic, paper, aluminum)
- Folding cartons
- Rigid packaging
- Closures for wine & spirits (capsules)

## Trusted by customers large and small



We produce packaging for over 20,000 global, regional, and national brands.

# Disclaimer



The information provided in this presentation is for informational purposes only and should not be taken as legal advice.

While we strive to ensure the accuracy and relevance of the content, it is not intended to replace individual assessments or consultation with subject-matter experts.

**Please note:** This presentation focuses specifically on **paper-based packaging**, meaning packaging made with at least 50% or more paper fiber content by weight.

# Why are we talking about paper today?

72%

of consumers  
in Europe

understand  
paper-based packaging  
claims and find them  
persuasive.

'Paper packaging'  
consistently ranks  
in the top 4 claims

in positively influencing  
purchasing decisions

(after 'recyclable packaging',  
'compostable packaging',  
and 'packaging made of  
recycled materials').

63%

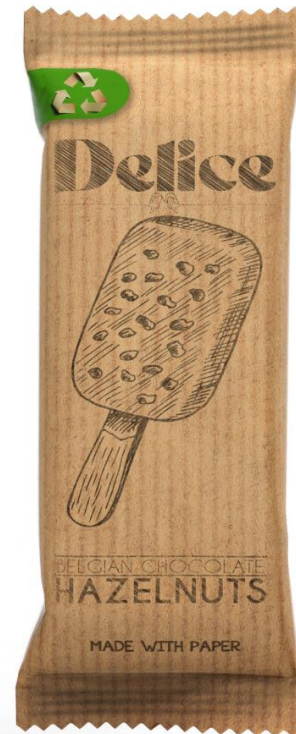
of consumers

say that they are  
actively taking steps to  
increase their use of  
paper packaging.

Source: Amcor Research, March 2024, based on 3,180 respondents in UK, France, Spain, Germany, Poland and Italy

Consumers seek more sustainable options, yet they don't always prefer a “kraft” look for paper.

Source: Amcor Research, February, 2024, 1 021 respondents in UK and France



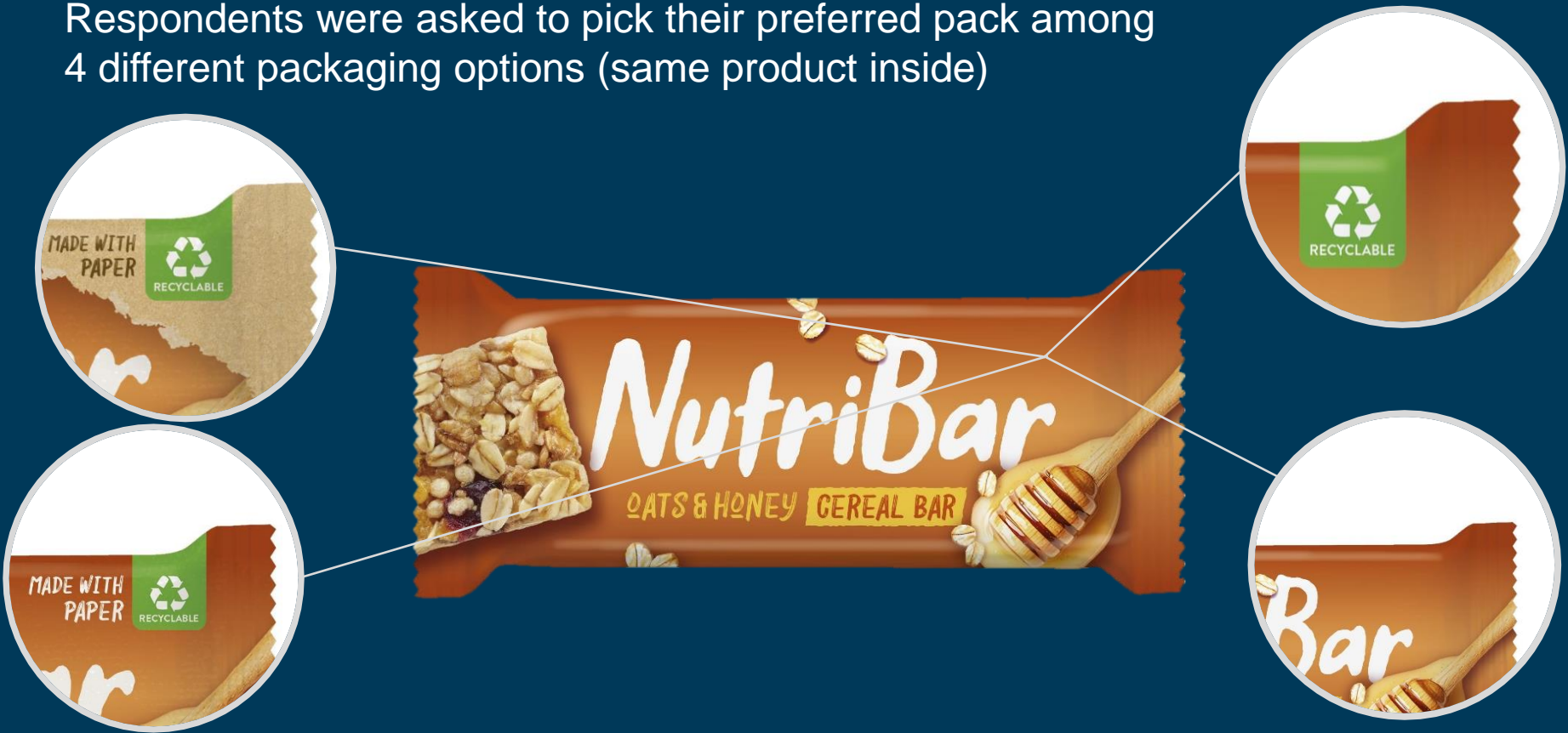


MYTH 1:

Consumers don't care  
what packaging is  
made of



Respondents were asked to pick their preferred pack among 4 different packaging options (same product inside)



Source: Amcor Research, June 2025, based on 3,085 respondents in France, Germany, Italy, Poland, Spain & UK

The two paper-based options got the most traction, with 68% of the respondents choosing them



Source: Amcor research, June 2025, based on 3,085 respondents in France, Germany, Italy, Poland, Spain & UK

# Paper-based packaging is perceived positively by consumers

*I am clear how to recycle this wrapper*



**89%**  
agree\*

*This wrapper helps me do my part for the planet*



**87%**  
agree\*

*I will always pick a paper packaging over a plastic one for environmental reasons*



**82%**  
agree\*



*\*Sum of "I agree strongly" and "I agree somewhat" related to paper-based packaging*

Source: Amcor research, June 2025, based on 3,085 respondents in France, Germany, Italy, Poland, Spain & UK

**88% of European  
consumers  
think more highly of  
brands using 'paper  
packaging'**

Source: Brookmark Research, P+PB Tracking Survey, May 2023. Consumer Audience – Aware Expressives.



MYTH 2:

Consumers won't pay  
more for paper-based  
packaging



**18%** of European consumers  
say they are willing to pay more  
for paper-based packaging

This figure is as high as  
**28%** in Italy

**82%** of consumers  
say they are willing to pay  
more for 'more  
sustainable packaging'

Source: Amcor Consumer Claims Research, 2025; [Paper Age: Paper Packaging Innovation: Less Fiber, More Strength, 2024](#)



MYTH 3:

Paper can't provide the  
necessary barrier for  
moisture-sensitive  
products



# The optimal barrier for each product's needs



$>50 \text{ g/m}^2/24\text{h}$   
**BASIC MOISTURE BARRIER**  
Dry goods, or secondary packaging.



$<50 \text{ g/m}^2/24\text{h}$   
**MEDIUM MOISTURE BARRIER**  
Foods like cereals, dry pet food,  
chocolate, or frozen products.



$<1 \text{ g/m}^2/24\text{h}$   
**HIGH-PERFORMANCE  
BARRIER**  
Powdered drinks, pharmaceuticals,  
very moisture sensitive products.

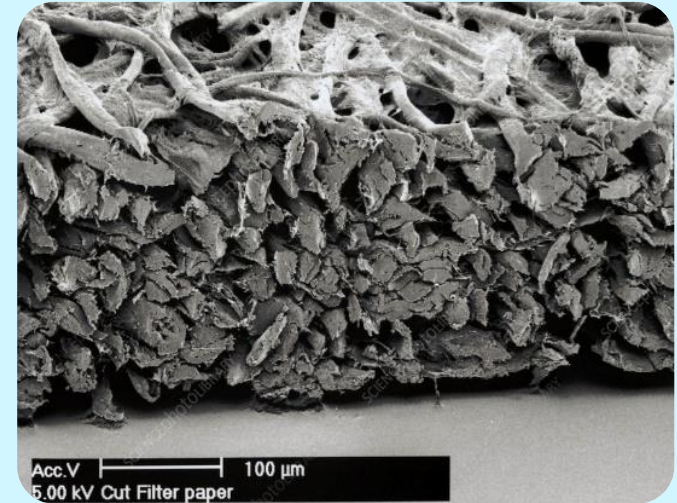
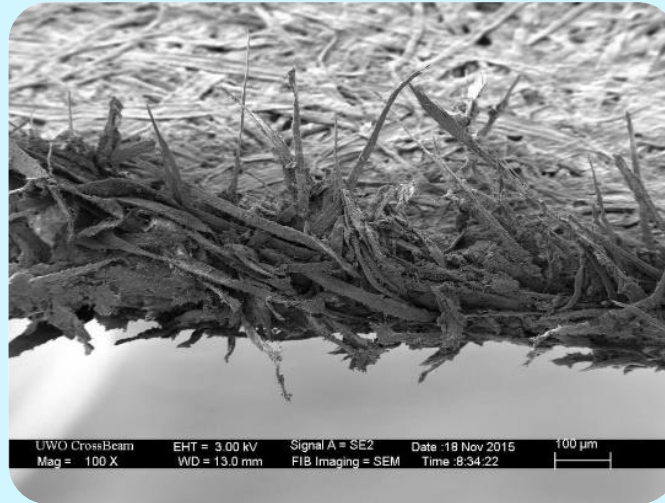
**BARRIER LEVEL**

# The nature of paper is porous

Paper is naturally porous, allowing humidity and oxygen to pass through.

The common options to add barrier to paper are:

- Extrusion coating
- Dispersion coating
- Direct deposition
- Lamination



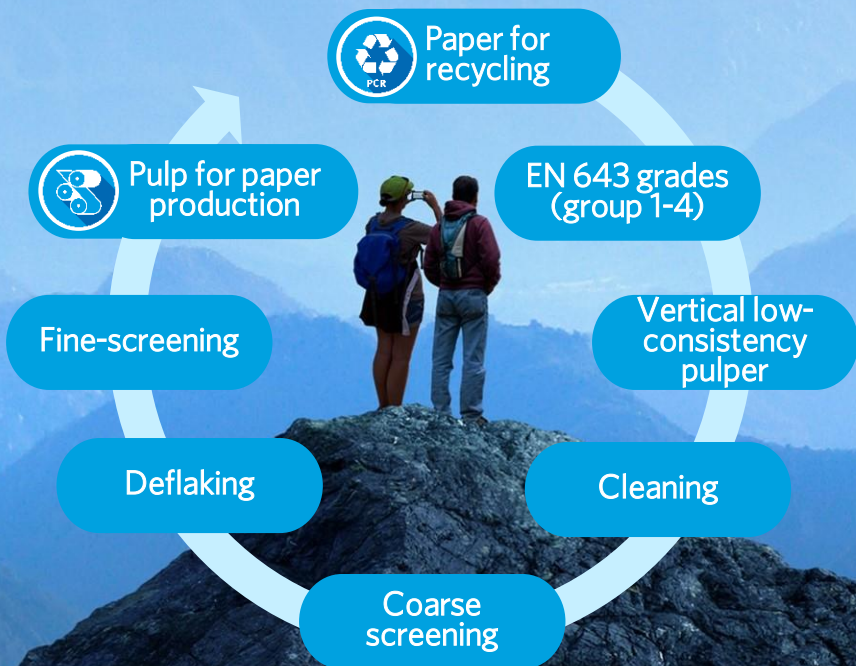


MYTH 4:

If there is some plastic  
in paper-based  
packaging, it's not  
recyclable



# What should be true for a pack to be successfully recycled in the paper stream?\*



1. Pack must be **recognized as paper** during the sorting process (e.g. paper needs to be on the outside of the pack).
2. During the pulping process, any non-soluble/non-fiber materials are filtered out during the coarse and fine screening.
3. Resulting paper-fiber yield of the process should be above 80%.

# Yes, it can be recyclable even with some plastic



Yes, designing paper-based packs for **recyclability & with barrier** is possible.

Industry-aligned laboratory testing and assessment methods are set through Ceper + 4evergreen.\*



In countries such as Brazil, where standardized testing is not yet established, we've collaborated directly with **local recyclers** to evaluate specific packaging solutions.



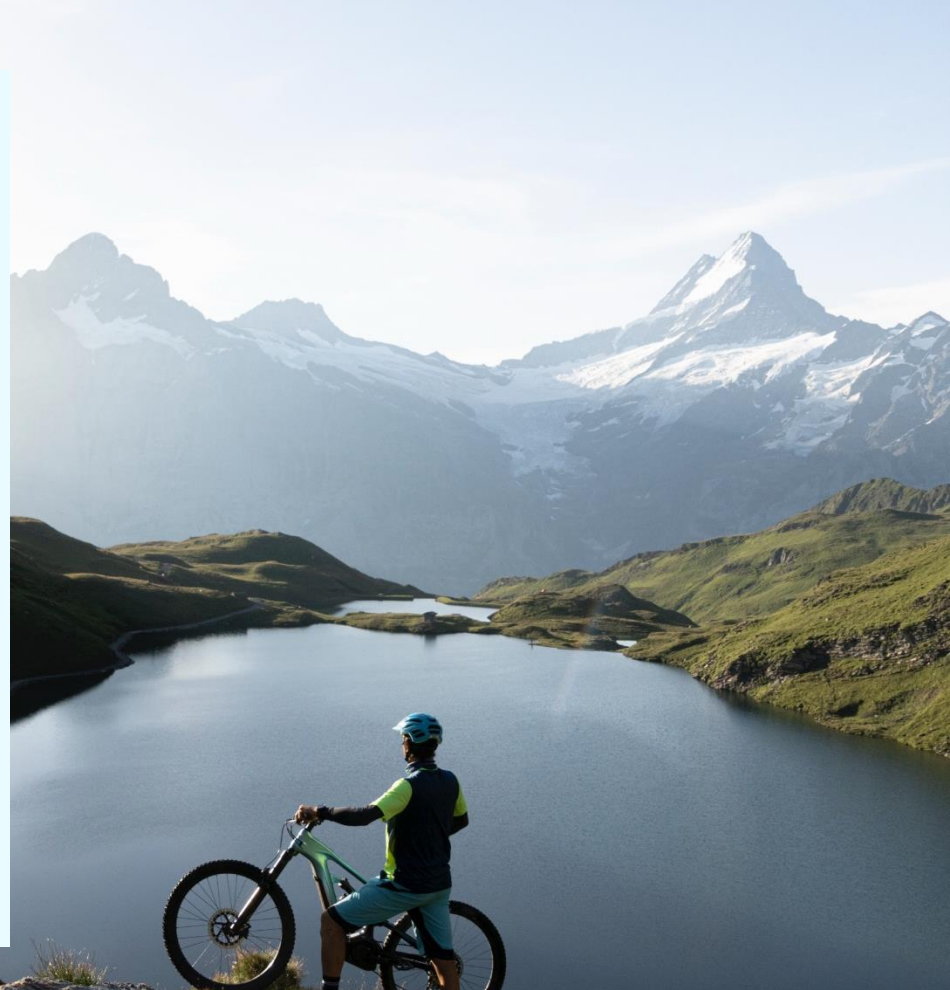
These tests showed AmFiber™ Performance Paper to be **compatible with local recycling infrastructure in Brazil.\*\***

We're happy to provide more information for other regions upon request.

# Yes, it can be recyclable even with some plastic

Principles of designing paper-based packaging for recycling:

- Pack **must be recognized as paper** during the sorting process.
- **Packaging with minimum 80% paper content** appropriately designed, can pass the test.
- 80% paper content should be of **adequate quality\***
- **Some plastic can be used** to fulfil the packaging functionality.
- Of course, **the more paper content, the better.**
- Paper weight should not be unnecessarily increased to reach requirements (greenwashing).





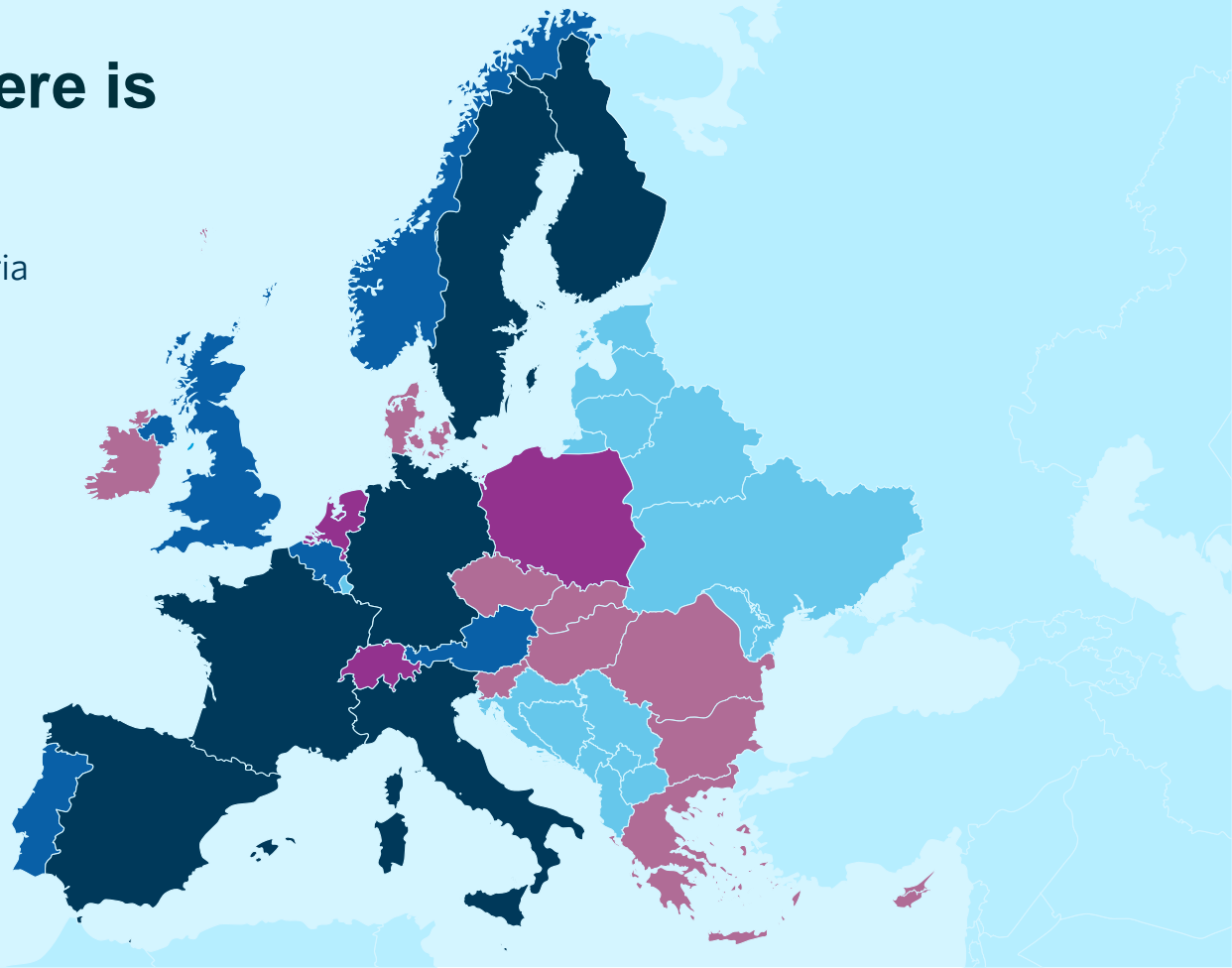
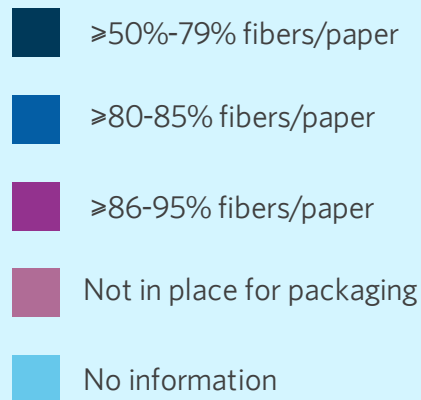
MYTH 5:

It's impossible to  
design for recycling as  
requirements are  
different by country



## Challenge: today there is little harmonization

## High-level overview of minimum criteria per country for paper recycling\*



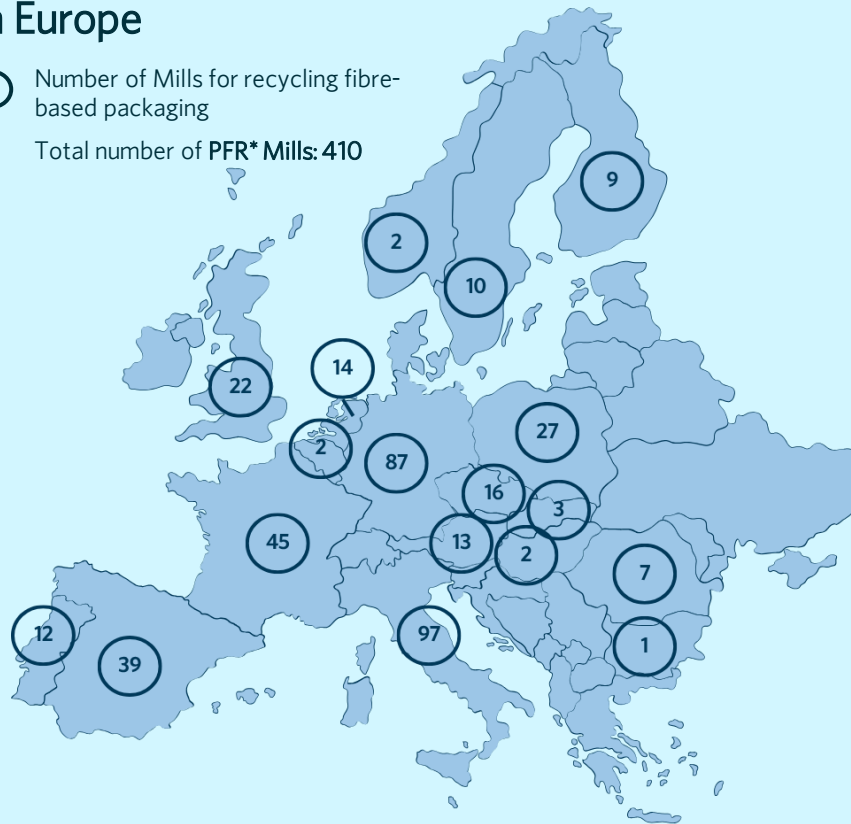
# Opportunity: paper recycling infrastructure is widespread

- Paper benefits from a wide recycling infrastructure that is in place at scale.
- Current paper recycling rate in the European Union: almost 80%
- This presents an opportunity to switch to paper-based packaging, if designed correctly.

## Recycling Mills for fibre-based packaging in Europe

○ Number of Mills for recycling fibre-based packaging

Total number of PFR\* Mills: 410



\*Paper for recycling

Recycling map source: 4evergreen, [Circularity by Design Guideline for Fibre-Based Packaging](#), page 60

Recycling rate source: CEPI Key statistics, 2023

# PPWR Reminder: Recyclability requirements for ALL packaging materials



Must be designed to be recyclable\* (i.e. recycle-ready)



Must have an adequate recyclability performance (grades A–C allowed)  
Packaging that is technically non-recyclable will be banned.



2030



Packaging must be recycled at scale, with a 55% recycling rate by 2035 for all packaging categories\*\*



2035



Further requirements on the recycling rate & quality coming in 2038



2038

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2035



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2038

## Principles of designing paper-based packaging for recycling:

- **Must be recognized as a paper** during sorting
- **Minimum 80% paper content** appropriately designed, can pass the test\*\*\*
- It can contain plastic. **The more paper content = the better**
- Paper weight **shouldn't be unnecessarily increased** to reach requirements (greenwashing).



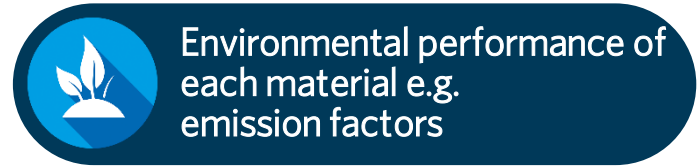
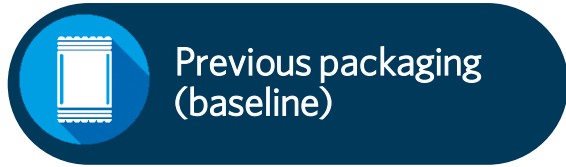
MYTH 6:

Paper-based  
packaging is always  
the most  
environmentally  
friendly option



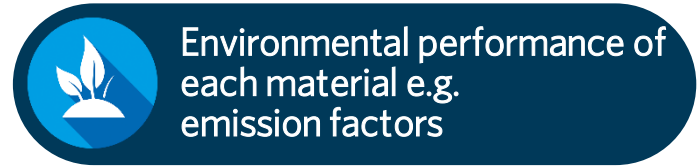
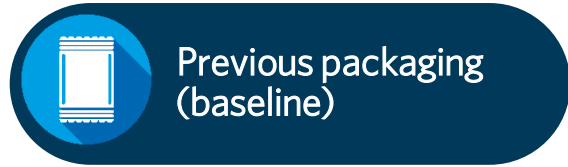
# It is not possible to draw general conclusions

It can depend on:




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It can depend on:



Environmental performance can be seen through various lenses  
e.g. GreenHouse Gas emissions, water use, other indicators

 Be aware: Vague terms such as “environmentally friendly” are already forbidden in many countries and will soon be banned across the EU under the Directive to empower consumers for the green transition.

# Paper-based for where paper makes sense



- Understand the environmental impact of your packaging through **life cycle assessment (LCA)**.
- Complete a **fact-based comparison** of several indicators such as carbon footprint and water consumption.
- Amcor can support customers with our **streamlined LCA tool: ASSET™**



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Ensure forests are managed responsibly through use of certified materials, such as those from FSC® and PEFC.



MYTH 7:  
Switching from plastic to  
paper-based packaging  
requires new machinery



Out of 242 paper-based trials, most ran on existing machines with minimal adjustments – no major investment needed.

We conducted over **240 trials** alongside **21 top machine manufacturers**, with over **50%** conducted at **their premises**. Our results show that minor adaptations, like **changing sealing jaws** or **forming shoulders** are often enough.

Additionally, we've worked with after-market providers to design custom parts (e.g. forming shoulders and sealing jaws) for paper-based packaging.





MYTH 8:

Paper-based  
packaging has  
format limitations,  
and is more difficult  
to customize



# Large range of formats available



# AmFiber™ applications across different segments

## AMFIBER™ PERFORMANCE PAPER STAND-UP POUCH

Recyclable, high-barrier paper-based pouch for sensitive products like instant coffee.



## AMFIBER™ PERFORMANCE PAPER FLOWPACK

Recyclable, high-barrier paper-based flowpack for snacks & confectionery.



## AMFIBER™ PERFORMANCE PAPER LIDDING

Recyclable, high-barrier paper-based lidding for rigid trays.



## AMFIBER™ FLOW WRAP

Recycle-ready flowpack for energy bars, protein bars, and functional foods.



# AmFiber™ applications across different segments

## AMFIBER™ PACKPYRUS PAPER-BASED WEB

Recycle-ready paper fiber-based tray for meat and dairy.



## AMFIBER™ MATRIX BREATHABLE WRAP

Recycle-ready paper-based wrap for soft cheese that supports the ripening process.



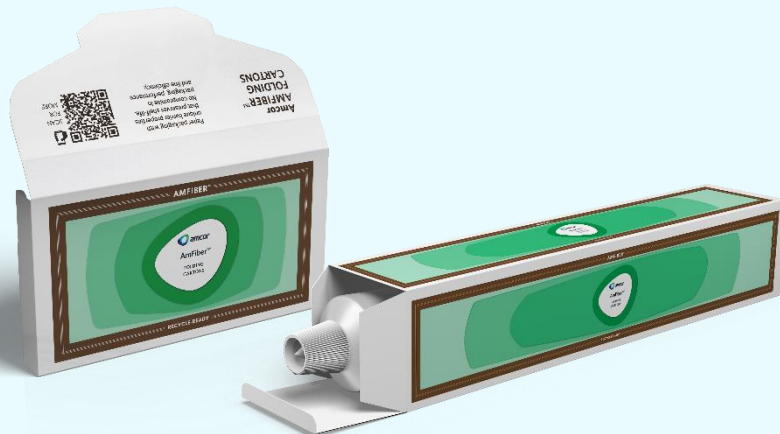
## AMFIBER™ FOLDING CARTONS

### Chewing Gum Pack

Lightweight carton with extensive print options, designed for easy carrying & strong shelf appeal.

### Toothpaste Pack

Visually striking carton with optional textured finishes and eye-catching foil details for shelf impact.



# Offset, gravure and digital printing for folding cartons

## Jaholo™ Prismatic Effects

Creates a unique prismatic and pattern movement achieved through a special micro-embossing with UV.



## Sunshine™ Premium Metallics

Provides a highly reflective metallic effect thanks to bright silver coating over an ultraviolet (UV) or electron-beam (EB) primer.



# The appeal of being transparent

## Consumers value transparency.

Transparent packaging allows consumers to see the product before purchasing, building trust, and confidence in product quality.



Semi-translucent  
paper-based solution



Paper-based pack with  
semi-translucent paper-  
based window  
(in development)

Amcor experts are here to support you with your packaging challenges. Our packaging designers, material scientists, and sustainability specialists are ready to help.

Our global network of **Amcor Innovation Centers** and **Catalyst™ innovation services** bring together packaging development experts, designers, and testing facilities to help you create your next pack.



# Wedel & Amcor: AmFiber™ Performance Paper // Market Story

- The solution contains 80% paper and uses at least 50% less plastic compared to the previous packaging.\*
- It offers excellent packaging barrier and product protection.
- Paper-based packaging enhances the product concept and stimulates purchase with a paper-based claim on the packaging

\*Comparing previous OPP20/OPP20 packaging vs AmFiber™ Performance Paper packaging with 80% paper content.



# KEY TAKEAWAYS



**Paper-based packaging with barrier** can provide excellent moisture protection for sensitive products like foods, powders and pharmaceuticals.



By following the current **4evergreen Design for Recyclability guidelines**, you can future-proof your packaging and stay ahead of the upcoming PPWR requirements



In many cases, **switching to paper-based packaging doesn't require new machinery**—just minor adjustments.



**Paper-based packaging is a strong branding tool.** With versatile formats and a well-established perception of sustainability, it resonates with eco-conscious consumers and helps brands stand out on the shelf.



The key is to make the **right packaging decision** – balancing product needs, production processes, and consumer expectations. We can help you explore your options and find what works best for your business.

# Thank you

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