CONVERTING: TECHNICAL THEME

Intuitive human-machine interaction, truly distinctive products, more complex demands, greater flexibility, reducing energy and resource consumption. Finding the right balance has never been more vital. A TWM report.

TWM/1: How is your business using AI to set new benchmarks?

Cristian Giuliani, Vice President Global Hygiene Engineering, BW Converting: "AI is setting new benchmarks in two main areas. First, it improves engineering productivity by accelerating technical research, patent and competitive analysis, software development, troubleshooting, and the retrieval and use of knowledge. Second, it embeds process intelligence directly into converting equipment.

"By combining machine data with decades of process knowledge, AI can interpret changing materials and operating conditions. Our adaptive winding and tension-control work helps machines estimate conditions in real time, recommend or apply settings, and improve continuously within known physical limits. Our patent-pending Go2Roll system uses available measurements to understand process conditions and translate them into useful responses.

"These capabilities can increase throughput and quality, speed product setup, reduce waste, detect deteriorating components earlier, and reduce reliance on individual operator experience. This is especially important as the skilled workforce undergoes a generational transition.

"AI also helps our engineers use more than 100 years of existing and new knowledge, collaborate globally, develop faster, and focus on higher-value equipment development and customer support. However, industrial AI requires reliable measurements, secure data, proper validation, and operator trust. Effective systems combine data-driven methods with machine physics, process physics, and domain expertise. They must also clearly show what the machine is detecting and connect those observations to specific actions. We are following this approach by embedding intelligence directly into the equipment."

Sergio Tonarelli, Chief Sales Officer, Futur "Futura's business is growing rapidly thanks to our focus on current industry challenges.

1. A large portion of the backbone of the industry workforce is made by persons born in the 60's and early 70's that today are coming to the retirement age. This "Great retirement wave" is making the industry lose know how. The T&T industry – except for a few forward-thinking companies – has relied mainly on human knowledge and experience. We need to change.
2. Today personnel turnover is an issue in every country, the new generations are looking for more attractive, cleaner, and safer environments free form heavy manual tasks, dust contamination and equipped with user-friendly machinery. We need to change the perspective and give our industry workers a supervisory role.
3. Automation, data collection and analysis, self-learning, self-adjusting machinery are keys to the success of companies that are looking at long term investment. AI will be a key partner in data collection, analysis and automatic process correction."

Nicola Romagnani, Marketing & Product Manager, Gambini: "A confession, first: at Gambini we are not using AI to set any benchmark. Not yet. I'd rather say it like this, than call a well-made spreadsheet "artificial intelligence" (it happens...)

"The real AI shake-up will come from the other end of the chain: the shelf! In the not-so-distant future, a good share of toilet paper will be bought by software agents, shopping on behalf of lazy or busy consumers. Since algorithms cannot squeeze rolls, they will just read the pack, compare what they can measure and ignore the rest. For a roll sold only by

sheet count, this could be bad news. But for a roll that can tell how it was made and why it is better, it's an opportunity: that's why we want an AirMill Technology badge printed on packs."

Guido Finocckì, Giotto Technologies Chief Sales Office "AI is creating interesting opportunities for the tissue converting industry, particularly in process optimisation, predictive maintenance, quality control and production planning. By analysing machine data in real time, AI-based systems can help identify inefficiencies, anticipate potential machine failures, reduce waste and improve overall production performance.

"For Giotto Technologies, we see AI as a valuable tool to complement our long expertise in converting technology and support the continuous improvement of our solutions. The opportunity lies in combining intelligent data analysis with innovative mechanical solutions to achieve higher product quality, greater production flexibility, and lower energy consumption.

"However, some challenges remain. These include the availability and quality of production data, the integration of AI into existing machinery and control systems and the need to demonstrate a clear return on investment. AI must deliver measurable benefits on the production floor, rather than simply add technological complexity."

Hazar Ulusoy, AP Management, ICM Makina: "We see artificial intelligence as one of the technologies that will shape the future of tissue converting machinery. For us, its real value lies not simply in digitalising machines, but in making production processes smarter, more accessible and more efficient.

"Our R&D activities include exploring AI applications, camera-assisted monitoring systems and intelligent machine control technologies. One particularly promising area is the use of large language models (LLMs) to enable operators to interact with machines using natural language.

"Such systems could allow operators to ask questions in everyday language, obtain technical guidance, better understand machine alarms and receive support with troubleshooting and setup procedures. When connected to machine documentation and verified technical information, these assistants could make machine knowledge more accessible and help operators and maintenance teams resolve issues more efficiently.

"In parallel, combining camera systems, sensor data and intelligent control algorithms could improve process monitoring, help identify quality deviations and reduce material waste.

"However, applying these technologies in industrial environments presents several challenges. The accuracy of technical information, data security, integration with existing machine systems and operator safety must all be carefully considered. AI-based assistants should provide guidance and decision support within clearly defined limits, while safety-critical machine functions must remain under the control of validated systems.

"At ICM Makina, we aim to combine these emerging technologies with our engineering expertise to address real production needs. We believe that more intuitive human-machine interaction, easier access to technical knowledge and smarter production processes will play an increasingly important role in the future of the tissue industry."

Vladimir Tchernichov, Sales Manager, Maflex "At Maflex, we are taking a pragmatic approach to artificial intelligence. We do not use AI to directly control our machines: process control remains based on deterministic logic, designed and validated to ensure predictable and reliable operation. Instead, we see AI as an important opportunity to improve software development efficiency and, progressively, the interaction between people and technology.

"Today, we already use AI tools internally within our software engineering department to support debugging, code development, and the optimisation of repetitive workflows. Our goal is to reduce the risk of errors, streamline certain development activities, and free up engineering resources for higher-value tasks.



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"Innovation starts with the converter's needs and turns them into practical engineering solutions,"

Vladimir Tchernichov, Maflex

"Looking ahead, one of the most promising areas is the evolution of User Experience (UX) and Human-Machine Interfaces (HMIs). Modern tissue converting lines generate large amounts of data, and AI could help turn this information into contextual suggestions that support operators, for example when troubleshooting an issue or performing more complex operations such as product changeovers.

"From this perspective, AI does not take control of the machine but becomes a tool that supports human expertise. It can help operators handle routine situations more independently while allowing specialised technicians to focus more on process analysis, optimisation, and improvement rather than routine troubleshooting.

"The opportunity is therefore twofold: making technology more accessible to those working on the production line every day while making better use of specialised technical expertise. Achieving this, however, requires a solid foundation: data quality and availability, reliable connectivity, cybersecurity, and a clear distinction between tasks that can be supported by AI and functions that must remain under deterministic machine control.

"For Maflex, the benchmark is not a machine that replaces people, but technology that uses AI to help operators and technicians work more effectively, make better-informed decisions, and apply their expertise where it delivers the greatest value."

Lorenzo Lupi, Vice President Sales and Marketing, United Converting Tissue: "Our company's journey follows a clear path: simplification. Just as we have done with our converting lines, our approach to AI starts with the simple things that can make our customers' daily work easier, freeing up their time to be more productive.

"We are currently running trials to explore how AI can improve access to technical information. Operators and maintenance teams often need to search across machine manuals, component documentation and service records to find an answer. A secure customer platform, supported by an AI assistant, could make that information easier to find and use.

"The opportunity is practical: less time spent searching, quicker access to relevant guidance and more time available to keep production running effectively. We do not intend to replace the online technical support provided by our team with a chatbot. Direct access to our specialists remains essential. The assistant would complement that service, helping customers find routine information while our technicians provide the experience and judgement needed to resolve more complex issues.

"The main challenge is reliability. Information must be accurate, relevant to the customer's installed equipment and handled securely. Our trials are helping us assess these requirements and identify where the technology can deliver useful results.

"For UCT, the benchmark is how effectively AI helps customers work. It is another step in our commitment of "Simplifying Tissue Converting"."

Giovacchino Giurlani, Valmet, Tissue Converting business unit: "AI is the buzz word of the moment, and Valmet has been strongly investing in it for many years. Especially in the machine learning field, we have been active with SAM (Self Adjusting Machines) products and Factory PAL. These products allow to find the best settings of the lines, increasing the performance and OEE.

"Lately we have also developed chat bots that allow an easier and more flexible access to the information they need. Examples are:

- better access to production history, understanding the correlation between performance and events. In summary a more powerful root cause analysis
- access to all the documentation we deliver (thousands of pages) in an easier and faster way."

TWM/2: Identify the top areas of technology in which your systems have stood out in 2026, and your R&D efforts for 2027?

Giuliani: "In 2026, our strongest technology differentiation came from equipment that better understands and responds to changing process conditions. Key advances included adaptive winding and tension control, improved process measurement, and clearer communication between machines and operators.

"Go2Roll supports intelligent process control by using machine measurements to understand the finished log and apply appropriate winding responses instead of relying only on fixed recipes and manual tuning.

"Our patent-pending Amplifiber technology advances embossing and bulk building by controlling the mechanical and thermal behaviour of the embossing interface while using significantly less energy than traditional methods. It efficiently builds bulk while better preserving base-sheet properties. It also improves safety and reduces downtime by removing roll-cooling delays, avoiding unintended adhesive heating, requiring no special or cooled bearings, and using standard steel engraved rolls.

"We also advanced our patented INVISIBLE-O Coreless technology by redesigning the motion method, adding key subsystems, and introducing a new clasp design. These changes increased reliability, throughput, and mandrel life while supporting environmental sustainability.

"In 2027, we will expand adaptive technologies, improve automated threading and restart functions, modernise the HMI and data architecture, and standardise successful technologies across our global portfolio. Our goal is equipment that is easier to operate, faster to commission, more consistent across products and shifts, and better able to optimize product quality as conditions change.

"These efforts move us toward a "lights out" model with fewer interventions, more automated recovery, and greater consistency."

Tonarelli: "Futura is working at the "zero manual task converting line" and we will present the evolution of the current Andromeda line next year. The main features will be: Andromeda, Autopilot, Integrated packaging.

"Andromeda and Autopilot represent the "Automation", Futura's "big brother" that investigates every aspect of the converting process. Eliminate manual tasks, prevent process issue, correct process deviation, self-tune the line at the best possible production speed, and harmonise every line component up to the palletiser."

Romagnani: "Our 2026 has a name on it: Deco Booster. A Concept Roll (we build machines, not rolls) embossed independently on both sides, with no back-embossing and only 0.4% of the sheet glued. Softer and more beautiful, yet less expensive than a TAD roll. It is patented and anyone with an AirMill can make it today.

"2027 will run on many fronts, let me just tell you some. AirMill leaves the rolls and enters the folded tissue realm: placed upstream of an interfolder, it brings premium wet embossing into AfH towels. Then a new unwinder for the core-maker, the machine nobody talks about (but everybody notices when it stops)."

Finocckì: "Giotto Technologies was founded with the aim of developing innovative tissue converting solutions. One of our key technological achievements is the Tripler embosser, featuring three embossing rolls operating simultaneously. During 2026 this innovative technology has enabled us to introduce DECO2, a new embossing concept that allows tissue converters to create truly distinctive products by combining different embossing patterns on the inner and outer plies, with one or more micro-embossed plies in the middle.

"This opens up new design possibilities and provides converters with a valuable competitive advantage, helping their products stand out on retail shelves.

"Looking ahead to 2027, our R&D efforts will continue to focus on improving every stage of the converting process. We believe there are multiple opportunities to introduce targeted technological improvements that deliver real benefits in terms of product quality, process flexibility and reduced consumption. Our goal is to develop solutions that enable converters to respond more effectively to



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Cristian Giuliani, BW Converting

evolving market demands while improving production efficiency and sustainability."

Ulusoy: "At ICM Makina, our approach to technology development is guided by a simple principle: "Simple is the Best." We believe that technological progress is not just about developing more sophisticated systems, but about making complex processes simpler, more intuitive and accessible to the people who use them.

"No-code and low-code technologies are already changing the way software is developed. With the help of AI, people with limited coding knowledge or even no traditional programming experience can now develop software by describing what they need in natural language and using well-defined prompts. This shows just how much technology is lowering the barriers to development. We believe a similar transformation is possible in industrial machinery.

"With this in mind, we are carrying out R&D activities focused on artificial intelligence and large language models (LLMs). Our ambition is to make our machines so intuitive that even someone who has never seen a particular machine before could learn to operate it with the right guidance. This does not mean compromising on safety or technical requirements. It means making the machine easier to understand and ensuring that users can access the right information when they need it.

"We are exploring how AI-powered systems could guide operators through machine operation, provide step-by-step assistance during breakdowns and maintenance, help identify potential problems and recommend preventive measures. Our longer-term vision is to develop an intelligent digital support centre that brings together the machine's technical knowledge and operating information, providing guidance throughout the production line.

"Of course, reliable data is essential to achieving this. AI systems can only provide meaningful and dependable guidance when they have access to accurate technical documentation, sufficient machine data and a clear understanding of operational processes. That is why collecting and evaluating reliable, relevant data is a key part of our R&D efforts.

"We see AI not as a replacement for people or engineering expertise, but as a tool that makes technical knowledge more accessible and helps people work more effectively. "Our goal is not simply to make machines smarter, but to make them easier for people to understand and operate. Ultimately, we believe the real value of technology lies not only in what it can do, but also in how easily people can put it to use."

Tchernichov: "Innovation starts with the converter's needs and turns them into practical engineering solutions. In 2026, our development efforts have focused primarily on advancing existing technologies to further improve performance, process stability, product quality, and machine accessibility. A significant example is LADON Evo, the evolution of our log saw platform for industrial tissue rolls. The project is the result of an extensive engineering review involving several machine components, from the redesigned machine structure and cutting orbit to the blade sharpening system and product handling during cutting, including newly designed smart clamps that increase the number of contact points with the logs during the cutting process. The objective was not simply to increase speed, but to create more stable mechanical conditions to maintain cutting precision, quality, and production continuity, even at high operating speeds in industrial tissue converting lines.

"Product handling and control represent another important area of development. Throughout the year, we have worked on new universal clamps, also redesigning solutions for Consumer lines and four-channel log saws. These improvements stem from analyzing how the product behaves throughout the converting process and the need for more precise control, particularly at higher speeds and when processing products with different characteristics.

"At the same time, we continue to develop production line flexibility, reflecting our approach to the specific



"As part of the upgrade to our automation platforms, we took the opportunity to further simplify our human-machine interface (HMI), making line setup more intuitive and improving the operator's interaction with the equipment. "

Lorenzo Lupi, United Converting Tissue

requirements of each converter. Products, formats, volumes, and production objectives can vary significantly. This is why we focus on modular architectures and automation solutions that allow production lines to be configured around current needs and adapted over time.

"Another important area is energy efficiency, through the development and application of technologies such as MERS, which recovers part of the energy generated during machine deceleration and makes it available for reuse within the production process.

"Looking toward 2027, we will continue focusing on process control and stability, automation, accessibility, production flexibility, and energy efficiency, with increasing attention to the long-term value of machinery. This means considering component availability, spare parts management, and the ability to maintain and improve equipment performance throughout its service life from the earliest design stages. These priorities reflect our approach to R&D: rather than developing technology for its own sake, we start with the specific needs of tissue converters and translate them into practical engineering decisions, both when developing new solutions and when improving existing machine platforms."

Lupi: "We have achieved several milestones in 2026 that we are particularly proud of, bringing together production flexibility, finished-product quality and simpler operation.

"As part of the upgrade to our automation platforms, we took the opportunity to further simplify our human-machine interface (HMI), making line setup more intuitive and improving the operator's interaction with the equipment. Feedback from production and service activities has been central to this work, helping us focus on improvements that make a practical difference on the factory floor.

"UCT has long been renowned for its expertise in industrial log saws, and we are pushing the boundaries again with our upgraded UNICO365 TWIN. This development builds on our experience in industrial roll cutting and our commitment to making the process more efficient, reliable and straightforward for our customers.

"Our Nexus Industrial platform follows the same philosophy. Independent converters often need to manufacture a wide range of products and respond quickly to changing orders. The value of a line therefore depends on how effectively it performs



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Nicola Romagnani, Gambini

across that product mix, from setup and changeovers to day-to-day operation.

"We have also made progress in paper forming through our Form IQ project, sustainable packaging is a fast growing niche, with the solutions we are developing more plastic containers will be replaced by paper ones.

"Looking towards 2027, we are not planning to reinvent the wheel. Our priorities are practical: refining proven technology, strengthening technical support and improving spare parts availability. The goal is to help customers get more from their equipment and ultimately make their businesses more competitive. That is what "Simplifying Tissue Converting" means to us."

Giurlani: "We at Valmet have changed our approach to the tissue mill, we don't think converting any more. We think process from the fibre to the finished product. This is a path that started back when the acquisition began and it is starting to bring the first results. The digital jumbo roll is an example. In 2027 this path will continue with further integration between the tissue machine and converting."

TWM/3: What customer trends / demands are shaping this?

Giuliani: "Customers increasingly expect measurable outcomes: higher production, more consistent quality, fewer manual adjustments, faster changeovers, less waste, easier maintenance, and less reliance on highly experienced operators.

"Product demands are also becoming more complex. Customers want greater softness, bulk, and absorbency while often using less fibre, changing fibre mixes, and controlling energy and material costs. This increases the need for embossing, winding, and control technologies that preserve sheet properties and adapt to variation.

"Flexibility is another priority. Converters need equipment that can support broader product



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Giovacchino Giurlani, Valmet, Tissue Converting

portfolios and changing market requirements without sacrificing efficiency. At the same time, systems must remain standardised, supportable, and understandable throughout their lifecycle. Advanced features have limited value if they cannot be commissioned consistently, validated during checkout, and maintained effectively. Overall, customers do not want technology simply because it is new. They want technology that makes production more predictable and helps their people and assets perform better."

Tonarelli: "Please see this as part of my first answer."

Romagnani: "Retail buyers are asking for something that, until recently, had no name: a textured tissue sitting between conventional and TAD. We call it C-TAD (Comparable TAD). Thirty years ago, asking a barman for an energy drink would have earned you his blank stare: the category simply did not exist. Then Red Bull came and now everybody knows what that kind of drink is. Rolls made with AirMill are on the same path: at first, only we talked about them; now consumers look for them. On top of that, consider that since the end of September the EU directive on empowering consumers for the green transition bans vague words like "eco-friendly" on packs, unless proven. A C-TAD made with AirMill takes about half the energy of a TAD product and that saving can be measured: solid ground for producers who want on their pack a green claim to stand on."

Finocchì: "Customer demands in the tissue converting sector are increasingly driven by the need to differentiate products, improve production flexibility and optimise manufacturing costs while maintaining high-quality standards. Consumers are looking for tissue products that offer a better combination of softness, absorbency, strength and visual appeal. At the same time, brand owners and retailers are seeking distinctive products that stand out on the shelves and create added value in an increasingly competitive market. This is driving converters to explore new embossing patterns, innovative ply combinations and more sophisticated product designs, such as those made possible by our DECO2 technology.

"Another key trend is the need for greater production flexibility. Converters must respond quickly to changing market demands, manage a wider variety of products and adapt production to different customer requirements without compromising production efficiency and quality of the final product.

"Finally, reducing energy and resource consumption is becoming increasingly important, both to control operating costs and to improve environmental performance. These demands are shaping our approach to innovation at Giotto Technologies: we focus on developing technologies that combine product differentiation with greater flexibility, improved quality and energy consumption reduction, helping our customers remain competitive in a rapidly evolving market."

Ulusoy: "At ICM Makina, we believe that current trends and customer expectations in tissue converting are increasingly shaped by the need for higher machine performance and capacity. Product quality, investment cost and energy efficiency are also important considerations. Other expectations, such as reliable technical service, strong after-sales support, proven machine references and reasonable delivery times, continue to play a role in how customers assess different solutions. For tissue producers, one of the main challenges is finding the right balance between production capacity, consistent product quality and operating costs. With energy and raw material costs remaining important considerations, we believe customers are looking beyond the initial purchase price and paying closer attention to long-term value and total cost of ownership. Machine reliability, maintenance requirements and production continuity are also important in this respect.

"Ease of operation and maintenance is another key expectation. A machine's value is not measured by its production capacity alone, but also by how easily operators can manage day-to-day production, make adjustments, change products and respond to unexpected issues. User-friendly control systems, clear interfaces, easy access to technical information and reliable service support can all help reduce downtime and improve overall production efficiency.

"Digitalisation and artificial intelligence may also create new opportunities to simplify machine operation, make technical information more



"We are supporting customers in combining innovation, sustainability and measurable economic benefi s."

Guido Finocchi, Giotto Technologies

accessible and improve maintenance processes. We believe customers will increasingly look for technologies that deliver practical benefits on the factory floor, rather than simply adding new features.

"At ICM Makina, we aim to meet these expectations through our engineering expertise, machine solutions tailored to customer needs and a commitment to continuous improvement. In our view, a successful converting machine should combine high performance, consistent product quality, efficient use of energy and raw materials, operational reliability and ease of use. Ultimately, the goal is not simply to invest in a high-capacity machine, but to achieve reliable, efficient and sustainable production over the long term."

Tchernichov: "One of the requests we encounter most frequently is the ability to produce more with the same line. Tissue converters need to manage broader product portfolios and respond to rapidly changing markets. We address this need through MAX-Flexible solutions, offering hybrid and combined converting configurations that expand the range of products that can be manufactured while allowing production to adapt to different requirements.

"However, production flexibility is only one of the trends we are observing. Every project starts with specific operating conditions. MAX-Access solutions address the need to integrate a production line into the customer's manufacturing environment, with configurations designed to optimize available space, plant layout, and accessibility while meeting specific technical requirements. With MAX-Premium solutions, the starting point is the value of the finished product. Quality, softness, embossing, lamination, perceived bulk, and consistent product characteristics may require specific technologies and line configurations, particularly when converters aim to develop products for higher-value market segments.

"These different needs are increasingly shaping our engineering approach: production flexibility, line integration, and finished-product value. They are not necessarily separate objectives and can be combined within the same project according to each converter's specific goals. At the same time, production continuity is becoming increasingly important. Speed and capacity remain essential, but customers are paying greater attention to what happens around the production process: changeover times, machine accessibility, maintenance, data availability, remote support, and response times. We are also seeing growing attention to energy consumption and total operating costs. For this reason, mechanical engineering, automation, energy management, and service can no longer be considered separate aspects. They must be approached as interconnected elements of the same production system."

Lupi: "Our customers ask us for the flexibility to serve different market requirements while maintaining consistent quality and controlling production costs. For independent converters, this often means switching between roll formats, paper grades, paper suppliers and finished-product specifications. They need equipment that handles this variety without lengthy adjustments or reliance on one particularly experienced operator. Ease of use is therefore a recurring theme. Customers value intuitive controls, repeatable settings and easy access for maintenance. Training and dependable technical support are also important factors in their investment decisions. Close collaboration with our customers is essential. Understanding what they need to produce, and the conditions in which they operate, gives our engineering work a clear purpose and helps us deliver improvements that matter to their business."

Giurlani: "Different markets request different products. The development is similar but there are cultural differences that condition also the products. The deep knowledge of what can be done and what are the limits of the full process benefits everybody. Customers want better products for their specific markets, to be competitive and that allow them to differentiate. We as Valmet can support them in supplying not only the best technology but also the best expertise in tissue making and converting. This reflects in our 'tissue performance for life' philosophy. It's about helping our customers during all the lifecycle of the Valmet technologies."

TWM/4: What opportunities and challenges in 2026 have had the biggest impact on your business, and how are you dealing with them?

Giuliani: "The biggest challenge in 2026 has been managing cost pressure while expectations continue to rise. Customers face volatile fibre, energy, component, and logistics costs, while retailers and consumers still demand value. As a result, capital projects need stronger justification. Sustainability follows the same pattern. Customers increasingly expect measured improvements rather than general claims. Advanced converting technology can create major opportunities by delivering the desired softness, bulk, and absorbency with less fibre, less waste, and more efficient use of energy and consumables. This can improve both environmental performance and margins. We are responding by working with customers to identify equipment and process choices that are most likely to deliver measurable results. Priorities include sustained production, less waste, fewer manual interventions, faster changeovers, and greater product consistency.

"Cybersecurity, data governance, and compliance are also becoming part of machine architecture as equipment becomes more connected and the EU's MR and CRA move toward enforcement. Customers want the benefits of data, diagnostics, and remote support without unmanaged operational risk. Meeting these requirements while maintaining performance, maintainability, and lifecycle support is increasingly essential to providing a complete converting system."

Tonarelli: "Every potential challenge raises at least one opportunity for the companies that have the courage to invest. In the end it is always a question of industrial margins. Today the market is more competitive, new players are arriving from Asia, private label is forcing prices (and sometime quality) down, and our customer are increasingly demanding. What can make the difference? While some of our competitors work to make their products more cost effective with cheaper simpler lines, Futura is concentrating in making our customer product more competitive increasing quality, machine performance and OEE."

Romagnani: "It sounds incredible, I know, but 2026 is set to become the second record year in a row for Gambini: almost €80m in revenue! Brazil surely weighed. For years that market had one dominant supplier: now it has two. We delivered the first AirMill built entirely there a year ahead of our business plan. Moreover, from 23 – 27 November we're opening our Joinville plant to show the first complete Brazilian line: a Seicento, our fully customisable line, equipped with TouchMax, the King of Embossers. Then, in October, the AirMill Technology Council was born. We all know Vespa clubs or Ferrari clubs: this one-of-a-kind, instead, gathered around an industrial machine. The room at TissueHub in Lucca was full of people from four continents, some of them competitors. One company, among the many there, even asked permission to print the AirMill Technology badge on its packs that same day. In the end, joining is easy: you just need to buy an AirMill!"

Finocckì: "In 2026, the biggest challenges have been customer margin pressure, higher operating costs and strong price competition, making tissue converting companies increasingly selective about capital investments and focused on shorter payback periods. At the same time, this is creating opportunities in automation, energy efficiency, productivity and machine flexibility, as converters look to reduce labour and operating costs while improving competitiveness.

"Innovation and sustainability are becoming increasingly important in our offering at Giotto Technologies, as we develop converting lines designed to deliver higher productivity, lower energy consumption and greater flexibility. We are supporting customers in combining innovation, sustainability and measurable economic benefits, helping companies improve both their operational performance and long-term competitiveness."

Ulusoy: "2026 has been a challenging year for the tissue converting industry, with inflation, rising raw material and energy costs, higher logistics expenses and continued pressure on customer margins.

"At ICM Makina, we are focused on managing these challenges carefully while maintaining the quality and reliability of our machines. For our customers, production efficiency, lower operating costs and ease of maintenance are becoming increasingly important. We see automation and digitalisation as practical ways to address these needs. At the same time, the



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Hazar Ulusoy, ICM Makina

EU Machinery Regulation (EU) 2023/1230, which will apply from 20 January 2027, requires machinery manufacturers to prepare for changes in areas such as machine safety, risk assessment and technical documentation. This brings additional engineering and documentation work.

"Sustainability is another important consideration, particularly in terms of improving energy and raw material efficiency and reducing waste. Despite these challenges, we remain positive about the future of the industry. Continued demand for hygiene products, together with manufacturers' efforts to improve efficiency, modernise existing lines and expand their product ranges, creates opportunities for further growth. We aim to respond to these changing needs through our engineering expertise and continuous improvement, developing reliable and efficient machinery that delivers long-term value to our customers."

Tchernichov: "One of the main challenges in 2026 has certainly been investment uncertainty. Geopolitical tensions continue to affect certain markets, slowing down or postponing new projects and making medium – and long-term investment planning more difficult. At the same time, we are seeing changes in the structure of certain markets. In South America, for example, mergers, acquisitions, and consolidation are leading to greater production concentration among large industrial groups, while the presence of independent small and medium-sized converters is gradually decreasing.

"This shift is also changing the nature of investments, with larger-scale projects, production strategies involving multiple facilities, and greater attention to technology standardization and integration. For Maflex, this evolution creates new opportunities to apply our expertise to complex, multi-line projects while maintaining the flexible, customized approach that characterizes our work.

"Adding to these challenges are cost pressures and the need for converters to protect their margins. As a result, new machinery is no longer evaluated solely on nominal production capacity. Operating costs, energy consumption, changeover and maintenance times, equipment uptime, and the ability to adapt to future requirements are becoming increasingly important factors in investment decisions.

"This means working on several fronts: developing modular, automation-ready systems, improving energy efficiency, and engineering machines that retain their value over time through component availability, spare parts, upgrades, and technical support. In an environment where some markets are slowing down while others are resuming investment, maintaining a diversified international presence is also essential. This allows us to pursue opportunities across different regions while maintaining close technical and commercial relationships with our customers. The challenge is therefore to find the right balance between performance, flexibility, investment sustainability, and long-term value, responding to a market that is evolving not only technologically, but also economically and geographically."

Lupi: "Uncertainty and energy costs are certainly the elephants in the room. For some of our customers, these pressures have put significant strain on cash flow. We have been able to help identify alternative financing solutions, enabling them to move forward with investments needed to regain competitiveness. Uncertainty also changes the discussion around investment and productivity. Customers need confidence that equipment will deliver dependable results under changing market conditions. Maximum speed is one measure, but the amount of saleable product delivered consistently over a shift, a month or a year is what ultimately determines the return on investment. Setup time, production interruptions and product quality all contribute to that result.

"Our response is to keep engineering, automation and service focused on these everyday operating conditions. We use feedback from installations and customer production to guide improvements, and we work closely with customers during testing to assess the products they actually need to manufacture. The aim is to help them make better use of their resources and remain competitive in a less predictable market."

Giurlani: "We all see the global trend of energy prices and the lack of labour force in many markets. This has increased the attention of our customers to certain subjects like sustainability and higher automation. We, as Valmet, have been working for these subjects very actively. In the sustainability side we have presented solutions in tissue making such as ViscoNip, NTTe and full electric mills to answer to these demands, and other innovations are coming soon! In converting during MIAC we presented our Advanced Factory that combined digitalisation and innovative machines bringing our customers closer to the autonomous mill."