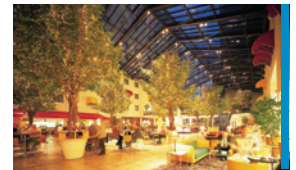


Produced by the European Federation of Corrugated Board Manufacturers

**A new venue for FEFCO
Technical Seminar - to be
held in Berlin for the
first time ever!**

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WALTER DE SMEDT
CHAIRMAN OF THE
PRODUCTION COMMITTEE

Editorial

Dear Readers,

As Chairman of the FEFCO Production Committee, I am pleased to announce that the 15th Technical Seminar organised by FEFCO will take place on 6th, 7th and 8th May 2009 at the Estrel Convention Centre in Berlin, Germany. (Open only to FEFCO Members).

This is the first time that our Technical Seminar has been staged in Berlin, famous for its accessibility to visitors coming from all over Europe. With everything under one roof including hotel, convention centre, restaurants, and other amenities, the Estrel conference venue in Berlin will make it easy for delegates to take advantage of networking opportunities.

FEFCO is confident that this new venue will live up to the changing demands of our industry, and we are convinced that this new multi-functional exhibition place will provide our delegates and exhibitors with the very best of modern facilities with optimum flexibility.

We have listened to what delegates have asked for, and so the Production Committee has decided to refocus the content of the conference programme on production and technical oriented topics. Our 2009 Seminar will cover four main themes: Corrugated Process and Raw Materials, Energy, Printing, and Corrugating Process Control.

All of these subjects are of great importance to corrugated board manufacturers and are also central to the development of our industry. We look forward to contributions from major players and from established experts in their field.

We are confident that this interesting and forward-looking programme will attract delegates from corrugated board manufacturers all over Europe, and we look forward to your valued participation.

Information regarding the 2009 Technical Seminar can be found on the FEFCO web site, but please do not hesitate to contact the FEFCO team if you have any questions.

I look forward to seeing you next year in Berlin in this new and exciting venue.

Walter De Smedt
Chairman of the Production Committee

FEFCO 15th Technical Seminar

6-8 May 2009

Berlin, Estrel, Germany



A new venue for FEFCO Technical Seminar - to be held in Berlin for the first time ever!

FEFCO's Technical Seminar is a conference and trade show for the European Corrugated industry and is open only to FEFCO members.

Over the years this has become the **Technical Platform for the corrugated industry**, a place where producers and suppliers have the opportunity to meet and exchange views on a wide variety of technical topics. This year, networking will be made easier since the conference, exhibition, social activities, and hotel will all be under one roof.

All the information needed is now available on the FEFCO web site. You can register on-line for the conference as well as for the exhibition. The event's website will be regularly updated with the latest information, so please go now to www.fefco.org and click on the Technical Seminar logo for further information (including the latest list of exhibitors).

In 2009, the programme will focus on production and technical oriented topics, highlighting four main themes: "Corrugated Process and Raw Materials", "Energy", "Printing" and "Corrugating Process Control"

Preliminary list of exhibitors

Absolute Engineering Ltd

APEX Europe B.V.

Adalis Corporation

BCM Transtech a/c

Dücker Corrpap AB

Durst Phototechnik GmbH

EMBA Machinery AB

Erhardt+Leimer GmbH

Escada Systems

Fosber S.p.A.

Kiwiplan

Minda Industrieanlagen

M-Real Corporation

Mülhen Söhn GmbH

OM Partners n.v.

Signode

Simon Corrugating Machinery

Sun Automation Group

Terdeca

Tiruña

Vega S.p.A.

Walki Group Oy

Witron Logistik + informatik GmbH

Preliminary Programme

Wednesday 6 May 2009

- 09.00 Registration
- 10.00 Exhibition commences
- 13.30 Opening of the Conference
FEFCO President
Walter De Smedt - Chairman
Production Committee
- 14.00 Session on Corrugated Process and
Raw Materials
- 15.30 Coffee Break
- 16.30 Spotlight session 1
- 18.00 Session ends
- 19.00 Exhibition closes

Hotel Accommodation

Do not forget to book your hotel accommodation. FEFCO has negotiated special rates at the Estrel Hotel. Estrel Berlin is Europe's largest convention, entertainment, and hotel complex. With 1,125 rooms and suites, five restaurants, two bars, a beer garden, and the daily live "Stars in Concert" show, Estrel has plenty to offer every guest.

Thursday 7 May 2009

- 09.00 Session on Energy – part 1
- 10.30 Coffee Break
- 11.00 Session on Energy – part 2
- 11.30 Spotlight session 2
- 12.30 Lunch
- 14.00 Session on Printing – part 1
- 16.00 Coffee break
- 16.30 Session on Printing – part 2
- 17.15 Spotlight session 3
- 18.00 Session ends
- 19.00 Exhibition closes

Cocktail sponsored by 

Hotel rooms can be booked immediately by simply downloading the booking form from the FEFCO web site and faxing it back to:
Sandra Holzäpfel
Director Convention & Event Estrel.
Mail: s.holzaepfel@estrel.com
Fax: +49 (0)30 / 6831- 2345

Friday 8 May 2009

- 09.00 Spotlight session 4
- 10.30 Coffee Break
- 11.00 Spotlight session 5
- 11.30 Session on Corrugating Process
Control
- 12.30 Award Ceremony and
closure by Angelika Christ
- 13.00 Lunch
- 14.00 Exhibition closes

Estrel Berlin
Sonnenallee 225
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Tel.: +49 (0)30 / 6831- 22522
Fax: +49 (0)30 / 6831- 2345
www.estrel.com

Contact for exhibitors:
Ria van den Bogaert at +32 497 05 0754
Ria@vandenbo.com

Contact for sponsorship opportunities:
Communications Director at +32 2 650 08 32
nathalie.schneegans@fefco.org

Retail Workshop Significant Trends in European Retailing

This new series of retail workshops organised by FEFCO on 30 September 2008, involved around 30 participants from eight different countries.

The initiative is in line with FEFCO's objective of improving services to members, and emphasises FEFCO's ambition to share and spread information and knowledge concerning retailers, who after all are our customers' customers.

The workshop provided an opportunity for FEFCO members to acquaint themselves with global, as well as European, retailing matters. A very thorough understanding, too detailed to be summarised in this article, was gained concerning the structure of the European retail market, and the policy of major European retailers such as Metro, Tesco, Edeka, and Carrefour.

The following is a summary of some important conclusions made by our European retail experts.



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Changing face of discounters

German Retail Trends

- Market share of the 5 leading German Retailers:

Edeka	21, 6 %
Rewe Group	14, 1 %
Schwarz Group	12, 3 %
Aldi Nord + South	11, 7 %
Metro Group	7, 2 %
Other	33, 1 %

- Germany is a difficult trading market with low profit margins.
- In each of the different food sectors, challenging relationships exist between buyer and seller.
- High slotting fees to place and maintain products on the retail shelf; and annual discussions between retailers and industry to re-negotiate conditions.

- Price sensitive market especially in the food sector.
- The purchase price is consumer-oriented. The German consumer wants quality, but price is even more important - he rather prefers to spend less money on food and allocate more money to luxury goods and other purchases.
- The discounter's market share is still growing - in 2007, the share was estimated at 42.2 % and the forecast for 2010 is for an increase to 50%. The top 6 discounters are: Aldi Group, Lidl (=Schwarz Group), Plus (=TengelmannGroup), Penny (=Rewe Group), Netto (=Edeka Group), Norma. 85% of the population in Germany has a discount store within 15 minutes or less travelling time from their home. The product range and the retailing style of these stores are constantly evolving, in response to more and more complex consumers' demands.

French Retail Trends

- Legal reforms will accelerate price competition (Law for the Modernisation of the Economy (LME)).
- Discount stores will continue to gain market share (+ 9.3 % between 2007 and 2012). In order of market share, the top five French discounters are: Lidl, Ed, Aldi, Leader Price, and Netto
- Private labels will continue to strengthen at the expense of established brands (H1 sales for brands - 4.1% vs. +3.3% for private labels).
- In France, Carrefour's concentration on the hypermarket sector will continue to cause problems since French retailing growth is mainly to be seen in the supermarket and discount sectors.

European Retail Overview

By Bryan Roberts,
Global Research Director



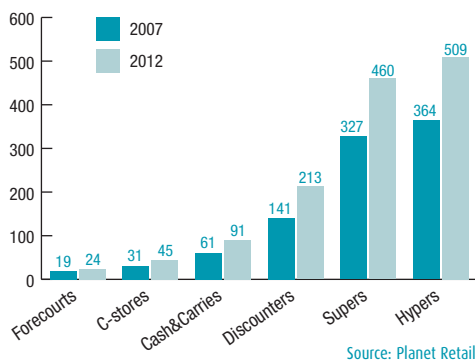
SIGNIFICANT TRENDS

- **The market consolidation will continue in Western Europe.**
- **Discounters will adapt the concept to widen their customer base in times of economic uncertainty.** The economic slowdown, the credit crunch, the financial crisis and commodity price increases have all contributed to a change in consumers' spending habits and increased the percentage of spending devoted to essentials.
- **Private label acceleration continues: In times of economic slowdown, both economy and premium private labels can benefit.** Contribution of private labels to global MGD sales likely to reach 20% by the end of 2008 and 23% by 2013.
- **Retailers are embracing green packaging.** They replace materials and try new types of packaging (eg: compostable, flow wrap film made from maize starch), and get more involved in waste management and recycling.

Similar trends were identified by other speakers covering the German, French and British retail markets.

“Our customers are demanding them, so we will continue to develop our private label alternatives, which are 25 to 30% cheaper than national brands. For the last three years our private labels have experienced double-digit growth.” Casino CEO, Jean-Charles Naouri.

Europe: Channel Size, 2007-2012 (EUR bn)

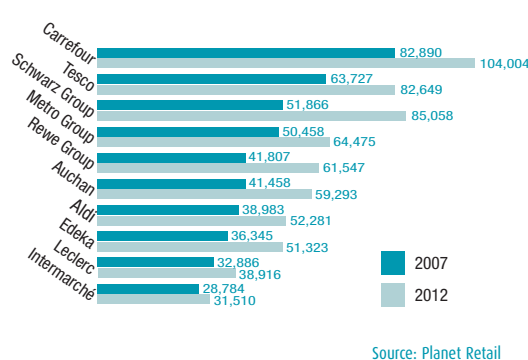


The marketing power of graphics

We thank all the speakers for their input and excellent presentations

- Mr. Bryan Roberts, Global Research Director, Planet Retail
- Mrs. Gudrun Klopfer, Retail Packaging Director, FEFCO
- Mr. Thomas Maiwald, Senior Consultant, QA Assurance Packaging Development, METRO Group
- Mr. Andrew Barnetson, Corrugated Sector Body Manager, CPI
- Mr. Tim Willaert, Marketing & Communications, The Greenery

Europe: Top Ten Grocery Retailers, 2007-2012 (EUR mn)



UK Retail Trends

- Growth slowing in retail.
- Move from town centre to 'out-of-town' (town centre retail to grow by 6.5% compared with 'Out-of-town' 15.4%).
- Dramatic growth in online sales, but still a small percentage overall, now reached £10.9bn or 4% of total retail sales.
- Grocery is the largest sector of retail, dominated by five majors (Groceries now account for 12.8% of all household spending, third after housing and transport).
- Importance of different store categories: multiples dominance of superstores (Supermarkets account for 72% of grocery retail) and significant growth in convenience stores, which now account for 20% of the grocery retail sector.
- Multiples have 79% of grocery retail market (Tesco, Asda, Sainsbury's, Morrisons and Co-op).
- Retailers looking for logistics efficiency - (Efficiency through the supply chain is absolutely fundamental - "We are going to move 10,000 product lines into retail ready packaging" Liz Hulbert, SRP Project leader, Tesco).
- Balance of 'own brand' vs. brand name.
- Retailers are facing various social challenges (accusations of excess profit, binge drinking as a result of the very cheap alcohol in supermarkets) as well as environmental ones (food miles debate, food waste, massive attention to packaging in the media).
- Major retailer trend to diversify into wide range of non-foods (own brand now appeals to different segments: budget, healthy eating, and premium luxury). They search for better margins & consumer interest.
- Leading environmental debate in very strong way.

For additional information please contact Gudrun Klopfer: gudrun.klopfer@fefco.org.

All the presentations can be downloaded from the Member's Only section of the FEFCO web site. Go to Members Only then to Events Review and click on the FEFCO Retail Workshop link.

FEFCO Voluntary Agreement

FEFCO has committed to a voluntary agreement to phase out phthalates in corrugated board.

FEFCO has subscribed to a voluntary agreement to phase out DiBP in corrugated board. Di-isobutyl phthalate (DiBP) belongs to a class of substances called phthalates, which can be used as a softening agent and/or solvent for adhesives and possibly some printing inks. The European Food Safety Authority (EFSA) has made restrictions on the use of Di-n-butyl phthalate (DBP), and according to recent assessments, DiBP should be subject to similar restrictions. In April 2007, the European Commission defined a specific migration limit from plastic to foodstuff (SML) for DBP as 0.3 mg/kg for repeated use. Recent studies have shown that DiBP has a similar toxicological profile as DBP and can therefore cause similar effects on reproduction and development.

FEFCO has already undertaken substantial efforts to request producers of adhesives to produce substitutes without DiBP

FEFCO represents the corrugated industry at European level and is therefore responsible for supplying a safe and sustainable product for the whole supply chain. This voluntary agreement to phase out DiBP, which has been put together in accordance with the EU legislation, aims to ensure the delivery of safe products.



The members of FEFCO are committed to phasing out DiBP from their products according to the following guidelines:

1. We will cease to use adhesives containing DiBP in paper and board applications;
2. DiBP should not be replaced by any substance which is known to have harmful effects;
3. We will report the measures taken on an annual basis.

FEFCO has already undertaken substantial efforts to request producers of adhesives to produce substitutes without DiBP. FEICA (Association of European Adhesives and Sealants Manufacturers) has issued guidance

for its members. FEICA members will report on an annual basis and members are already offering substitutes for adhesives used in the corrugated board industry. FEFCO will promote this voluntary agreement at international level within the International Corrugated Case Association (ICCA) in order to persuade overseas producers of corrugated board to phase out the use of DiBP which will help to further reduce the level of DiBP in the recycling loop.

For more information, please contact
Maria Casado: maria.casado@fefco.org
+ 32 2 626 98 36

National Associations Updates



Spain

► **AviAFCO, the new corrugated board packaging solutions for poultry products**



No matter what the challenge is, the corrugated board industry can rely on its research and development to meet the changing demands of the supply chain, and will continue to provide innovative packaging solutions. As we become more aware of the need to respect our environment, and the need to conserve and recycle our resources, corrugated board which is 100 % recyclable, becomes more important to the modern world.

Corrugated board has a part to play in the shipping of fresh poultry. Specialised packaging developed by AFCO is used to transport whole chickens from providers to the distribution centres of supermarkets, wholesale markets and other sales points. AviAFCO boxes are manufactured entirely from corrugated board and are ideally suited to manual emptying, weighing, labelling, and restacking. As a guarantee of quality, the boxes bear AviAFCO seal, registered by AFCO, along with the number of the manufacturer. This stamp on the box assures the customer that the packaging meets all the technical characteristics and the quality requirements which have been established for this product, as well as environmental accreditations.



France

► **The 6th "Corrugated Stars" Emballage Paris, 17 November 2008**



For the past six years, ONDEF (Emballage Ondulé de France), the French Association of corrugated board producers, has organised an industry contest known as "the Corrugated Stars" (Les Étoiles de l'Ondulé). The 2008 event took place during the celebrated World Packaging Fair "Emballage" in Paris Nord Villepinte.

This year, the event focused on **Innovations and the Role of the Future Generations**, and students were particularly honoured in the 2008 event.

Three prizes were awarded to the young generation of « Corrugated Stars! »

- ★ Young Star / Packaging
- ★ Young Star/ Project
- ★ Special Creativity Award

This ceremony took place at the ONDEF stand on Monday, 17 November 2008.

The awards were given by the President of ONDEF, Jean-Marie Paultes, to the below winners:

★ **Young Star/ Project**

ESIEC : « The Triangle - 3 DVDs » by Isabelle Chevalier, Paul Yannick Mangondo and Cédric Pambou.

Given the quality and number of projects (32), two « Special Creativity Awards » and Two Young Star / Packaging were remitted this year.

FEFCO

► **NADs Meeting – Edinburgh**

During the last National Association Directors meeting, held in Edinburgh on 8 October 2008, Andrew Barnetson, Corrugated Sector Manager at CPI (UK), warmly thanked the Associations' Directors for their support and valuable collaboration during his two-year period as Chairman of the NADs Committee. He has handed the Chairmanship of the NADs Committee to Ignacio Carro of AFCO (Spain).

★ **Special Creativity Award**

- **ESEPAK : « Pastry / caterer pack** by Lucie Metra and Anne Michel-Bechet.
- **IUT / REIMS : DVD case** by Nicolas Bru and Lucien Pomie (see picture).



★ **Young Star / Packaging**

- **INSFA : « Ephemeral cellar for 5 Bottles »** Nicolas Erabit, Claire Quinton, and Carole Jeguou.
- **Lycée Louis Delage : « Pot'Pack »** Thibault Merini (see picture).



For more information and press enquiries, contact ONDEF at + 33 1 42 68 01 94 ondef@online.fr www.ondef.org/actualites.php



Andrew Barnetson in a typical Scottish kilt that he wore on the occasion of the NADs dinner which took place in Edinburgh on 8 October

FEFCO Activities



► Update on FEFCO campaign brochures

7 Rules of Efficient Packaging brochure N°1 and *Corrugated News* N°1, have been translated into 7 different languages,

and three additional languages are in preparation. *Corrugated News* N°2 and N°3 have been distributed and will be translated on request by National Associations.

The next issue (*Corrugated News* N°4) will be released in December 2008.

All these publications can be found in the Publications/Brochures section of the FEFCO web site <http://retail.fefco.org>.

For more information, please contact Gudrun Klopfer, Retail Packaging Director: gudrun.klopfer@fefco.org

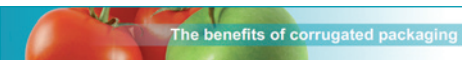
► The 7 Rules of Efficient Packaging promoted on EURACTIV web portal



FEFCO has been promoting its brochure, the 7 Rules of Efficient Packaging on EurActiv portal, www.euractiv.com.

A set of banners in flash format using the same design as the brochure will be featured in various relevant sections of the EurActiv portal with a direct link to the FEFCO website. This campaign ran from 20/10/08 to 3/11/08.

Euroactiv is a useful point of reference, both for key EU decision-makers and for journalists, and has a Europe wide readership of 505,000.



► Announcement CITPA – new Secretary General

Angelika Christ has been appointed Secretary General of CITPA. After a transitional period of one year, her intention will be to hand this role over to Maria Casado, EU Affairs Manager of FEFCO. <http://www.citpa-europe.org>

Calendar of Events

► 2009 ICCA/WCO Global Corrugated/ Containerboard Summit

April 20-23, 2009

Imperial Hotel, Tokyo, Japan

The next decade: How will you compete and thrive?

For more information or to

register, visit www.iccanet.org.



► FEFCO at Fruit Logistica

FEFCO is taking part in this trade fair in Berlin for the first time with a 80 m2 stand located in Hall 5.2 where international growers and grower organisations will exhibit. The main target groups are retailers, growers and grower organisations, packers and fillers, suppliers of erecting machines, professional press, and politicians.

The FEFCO stand is designed to highlight the benefits of corrugated packaging and to show the efficiency of our solution for the packaging and distribution of fruit & vegetable products.

FEFCO believes that corrugated board packaging is the perfect solution in terms of logistics, sustainability, and printability. Fruit Logistica is an opportunity to advertise these good qualities. FEFCO encourages members to be present in order to support the industry and help demonstrate the values of corrugated board packaging.

For more information, please contact Gudrun Klopfer, Retail Packaging Director: gudrun.klopfer@fefco.org

► 15th FEFCO Technical Seminar

6 – 8 May 2009

ESTREL Convention Centre

Berlin, Germany

www.fefco.org/?berlin

Industry Events

► Sino-Corrugated

7-10 April 2009

Shanghai New International Expo Centre

Shanghai, China

www.sino-corrugated.com

Other Events

► Pharmapack 2009

21 - 22 January 2009

Paris, France

Email: pharmapack@cancom.com

www.pharmapack.fr

► Fruit Logistica

4 - 6 February 2009

Messe Berlin, Germany

www.fruitlogistica.com



► CIES International Food Safety Conference

4 – 6 February 2009

Catalonia Palace of Congresses

Barcelona, Spain

www.ciesfoodsafety.com

► Packtech 09 - easyFairs

11 – 12 February 2009

NEC, Birmingham, United Kingdom

Email: david.fergus@easyfairs.com

www.easyfairs.com

► Anuga FoodTec

10 - 13 March 2009

Koelnmesse, Germany

www.anugafoodtec.com

► Ipack-Ima

10 - 14 March

Fiera Milano - Milan - Italy

www.ipack-ima.com

FEFCO

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