

Produced by the European Federation of Corrugated Board Manufacturers



FEFCO Technical Seminar succeeds in Berlin

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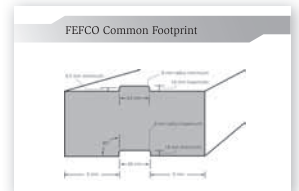
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ANGELIKA CHRIST
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Editorial

Dear Members,

"Well done!" was the comment by President Bob McLellan at the closing session of our 15th Technical Seminar. Each of the conference sittings began on time with a light-hearted dance performance by Theatre Mobile, but every session featured well-prepared, interesting and professional presentations by the speakers, all chosen by the FEFCO Production Committee. Our exhibitors seemed pleased with the number and quality of their visitors, and from registration to the handing out of awards everything went well.

However, we think there is room for improvement. Some things did not go as smoothly as we would have liked, and there will definitely be some minor changes in two years' time. In the near future we will be speaking to our supplier members and with members of the corrugated industry so that we can hear their suggestions, and in the coming months we will also be discussing timing and location for 2011.

In this issue you will read all about the Technical Seminar - we at FEFCO are very happy to provide this kind of platform for you. This event has only just finished, but planning has already begun for the FEFCO Summit that will take place in Barcelona on 22-23 April 2010. This "Summit" is a merger between the classic "FEFCO Congress" and the "Marketing Congress", and the content will focus both on leadership and marketing issues.

We hope to see you there!

Angelika Christ

FEFCO succeeds in Berlin

6-8 May 2009

Berlin, Estrel, Germany



FEFCO Technical Seminar
6-8 May 2009, succeeds
with excellent attendance
and speeches



Opening the fifteenth FEFCO Technical Seminar, Bob McLellan reminded delegates that in corrugated packaging we had a uniquely sustainable product that we should be proud of. Held in Berlin for the first time, this event attracted no less than 533 delegates and exhibitors from 40 different countries.

FEFCO's Technical Seminar has become the premiere platform for the promotion of technical solutions related to the production of corrugated board and packaging. The FEFCO event is now the only conference and trade exhibition in Europe bringing together buyers and suppliers of corrugated packaging machinery, equipment and services.

The Estrel Convention Centre proved to be the ideal venue, with hotel, restaurants, conference and exhibition facilities all under one roof, and the Seminar content featured four main themes, each with a number of speakers.

FEFCO Technical Seminar 2009 Estrel, Germany

- 533 delegates
- Corrugated industry participants doubled since 2007
- 58 exhibiting companies and their 142 representatives.
- 40 countries
- 9 journalists

The conference

► **Light Weight Papers on the Corrugator: Opportunities, Troubles and Solutions**
Chaired by Pawel Rogalka, AQUILA Spolka (PL), and Laszlo Koscsó, Rondo Budapest (HU)

Session 1 on May 6th covered the subject of lightweight papers, with each presentation covering a different aspect, describing the potential problems as well as opportunities, and offering a number of solutions.

The delegates were warned that 'the future arrives faster than you think', with 75 gsm papers and 2.8 metre corrugators quickly becoming a reality. Every new European paper machine built since the year 2000 has been for lightweight papers – more likely to produce minor faults in corrugated board, and demanding higher levels of skills and technology.

Really enjoyed the conference. Technical content ensured a good learning experience from some excellent presentations. The conference had the added benefit of excellent services all at one venue. Would definitely recommend attendance to colleagues.

Vincent McDermott,
DS Smith, UK

FEFCO Succeeds in Berlin

6-8 May 2009

Berlin, Estrel, Germany

► Best Use of Energy

Chaired by Richard Höfer, SCA Packaging Welpa (AT) and Roland Fritz, Lande Langenbach Group (CH)



On the morning of May 7, the speeches were centered on energy cost savings from improved technology, and from better analysis, understanding and management.

This Session dealt with 'Best use of Energy', with combined heat and power generation under serious consideration by many companies.

However, its viability is highly sensitive to the relative prices of gas and electricity. Most businesses would benefit from a meaningful energy audit that could well reveal considerable potential for cost savings. Compressed air systems are often overlooked, but here again, an audit of demand and usage may yield savings. Session 2 ended with the thought-provoking conclusion that producers should be aiming to manufacture their sustainable product in the most sustainable manner possible.

► Panel Discussion "Quo Vadis Corrugated: Actual Challenges to our Industry"

Bob McLellan (FEFCO President), Walter De Smedt (Chairman of the Production Committee), Christian Engels (Chairman of the Board - BHS), Moderator Angelika Christ (FEFCO Secretary General)



Spotlight presentations

The seven-minute 'spotlights', featuring short presentations of the latest technological innovations by suppliers to our industry always generate great interest amongst the delegates. These spotlight sessions have become very popular and again this year

our jury was responsible for choosing some winners from the 30 suppliers who took part in four 'spotlight' sessions. At the end of the Seminar FEFCO presented the following awards:

★ Best Innovation



► **Gold Award**
Fosber for the "Lubrication Free Thin Blade Slitting"

★ Best Innovation



► **Silver Award**
Wilhelm Bahmüller for the "Topmatcher - Turbox Shelf Ready Packaging"

★ Best Innovation



► **Bronze Award**
Apex Europe B.V. for the "Genetic Transfer Technology - Bye Bye Anilox?"

★ Best Presentation



► **Göpfert**, for its "Göpfert Technical Update"

★ Energy Saving



► **Cargill Europe BVBA** for the "C*RheM, the New Adhesive Conditioner based on Renewable Materials"

The FEFCO technical panel, chaired by Angelika Christ, talked through some of the challenges facing the market place. All of our experts agreed that technical innovation formed part of the solution for our times, but at least one of the panel believed that emphasis on quality was more important than continued growth.

► **Exceeding Printing Limits**

Chaired by Rauno Tapiola, Stora Enso Packaging (FI), and Dominique Lagarde, Smurfit Kappa (FR)



'Exceeding Printing Limits' was the topic for the third session, with the first speaker pointing out that the choice of flexo or letterpress, silkscreen, gravure or digital, was dependent on a combination of customer expectation, manufacturers' preference, the print layout, and volume. The second speaker on this subject gave a presentation full of practical advice – some of it unexpected – accumulated from a life-time of hands-on experience. Finally in this session, on the subject of digital printing it was confirmed that it is highly unlikely that digital printing will ever replace flexo, but it has its place in the production of shorter runs and large formats, as well as in the case of short lead times. Developments in ink and print head technology are combining to bring about faster digital printing speeds.

► **Process Control**

Chaired by Julian Pachniewski, VDW (DE) / FEFCO, and Walter De Smedt, Smurfit Kappa Europe / FEFCO



The final session on May 8 compared the automatic quality control systems that are available on the market and the many opportunities for improving quality, both 'off-line' and in a 'real life' environment. It gave delegates the opportunity to catch up on developments in process control, and the technical aspects of dealing with warp. They were warned that 'if you do not measure, you cannot control, and if you cannot control, you cannot improve'! A great deal of work is needed before we can understand fully how paper characteristics affect board quality, and the closing words of the very last speaker of the entire Seminar contained a plea for continued co-operation in the corrugated industry – 'Let's invent together!'

Theater Mobile

The commencement of each conference and Spotlight session was marked by a performance from Theatre Mobile, who managed to illustrate with mime and dance each of the seminar themes, and who also showed Spotlight speakers how not to make a presentation.

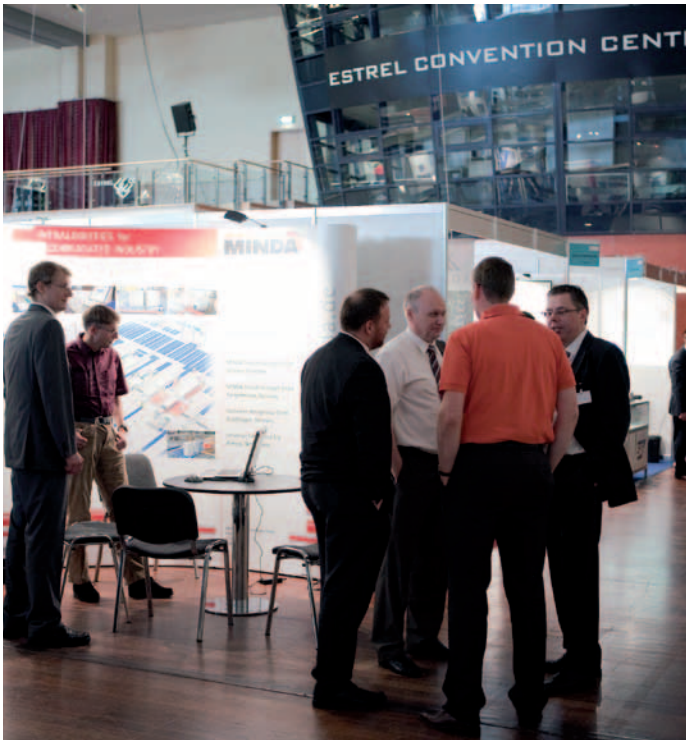
Excellent performance of the actors, it lightens up the topics.

Jan van der Plas
SmurfitKappa Benelux



FEFCO succeeds in Berlin

6-8 May 2009
Berlin, Estrel,
Germany



Exhibitors report no shortage of visitors

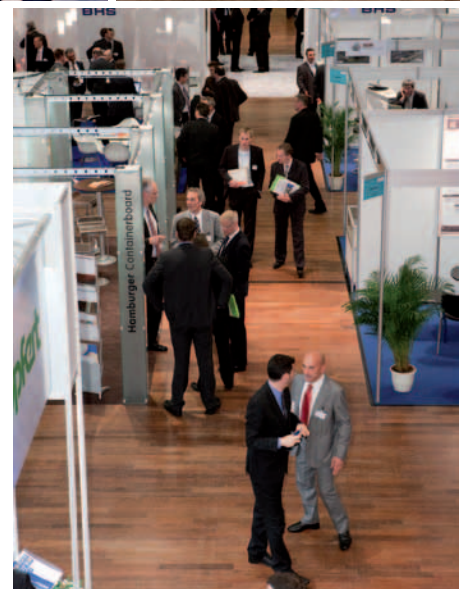
Exhibition

The 58 exhibitors' booths were situated immediately adjacent to the seminar hall, making it easier for around 30 of the exhibitors to take advantage of a number of seven minute 'spotlight' opportunities throughout the Seminar, with the best presentations receiving awards in the closing ceremony.

Participants at the Estrel Centre all received the benefit of information concerning the very latest industry advances, and were also able to take advantage of a unique opportunity for networking. There is no other event in Europe combining a conference and trade exhibition, bringing together buyers and

Conclusion - the 2009 event has been a resounding success

suppliers of corrugated packaging machinery, equipment and services. The overwhelming conclusion of those leaving this FEFCO seminar was that the 2009 event had been a resounding success.



FEFCO Cocktail sponsored by apex

A large crowd gathered on Thursday evening in the Estrel Foyer, where for the third time Apex was pleased to be given the opportunity to sponsor a Cocktail party.

Contact: Apex Europe B.V.
info@apex-europe.com
www.apex-groupofcompanies.com



Networking continues over cocktails

The "Orchestra" of the 15th Technical Seminar

From left to right: Marc Van Damme, Walter De Smedt – the "Maestro" (Committee Chairman), Rauno Tapiola, Henry Tan, Pawel Rogalka, Dominique Lagarde, Julian Pachniewski, Richard Höfer. Not shown: Roland Fritz.



Artist display Ol Fischer

Near the coffee break area, delegates were able to view several pieces of artwork made from corrugated, contributing to the relaxed atmosphere.



Corrugated masterpiece



Painted corrugated board

For more information about Ol Fischer's work, please visit the artist's web site:
www.ol-fischer.de

FEFCO E-commerce Workshop

LA REDOUTE

12-13 March 2009

Mercure Hotel in Lille Airport,
Lesquin - France

The Communications Committee of FEFCO continues its programme of practical Workshops. The theme this year is e-commerce, a dynamic segment that is still in its infancy.

About 15 people attended this very focused workshop and they were given the opportunity to visit the la Redoute facilities, a privilege that very few people can claim to have enjoyed! The activities began with a general introduction about e-commerce and ended with a dinner.

Day 1 - General Introduction

► Trends & opportunities in e-commerce by Jean Pitz - Consultant in Strategy & Management

The first presentation was given by Jean Pitz, a former manager within the GIB Group, the n°1 Belgian retailer. Jean's career with GIB covered a wide variety of activities such as finance, logistics, store management, purchasing and also internet activities. Today he

uses his experience and expertise as a consultant specialising in strategy and project management.

This presentation aimed to deliver general information but also highlighted some trends of particular importance for the packaging industry, which are summarised as follows:

From Atoms to Bits

One of the big challenges the industry faces is the fact that products are increasingly digitalized and have been transformed from being a physical object to a virtual medium. This means that the volume of packaging needed to pack some products is decreasing (CD > MP3; DVD > Internet download; Book > eBook; Software; travel- e-tickets).

Logistics is the weak part of e-commerce

Because:

- Boxes cannot always be delivered at home.
- Picking points are not always practical and there is still much room for improvement.

Jean believes that clever solutions can be found and those who are able to develop them could be the winners of the e-commerce battle.

A good example of the adaptation of the packaging to the product

was given by Jean Pitz who underlined the successful launch of the Black Socks web site: www.blacksocks.com

The business model of this site was developed around the idea that it is possible to fit an envelope into anyone's mail box, so they managed to fit 3 pairs of socks into an envelope in order to avoid the picking issue and they also developed a subscription system with automatic repeat delivery every three months.

► Augmented packaging - online trends and technologies that can influence packaging" By Martijn Arts - Total Active Media

The second speaker, Managing Director of Total Active Media, gave a very unusual and colourful speech with many futuristic and innovative packaging ideas. He demonstrated that many developments will soon have a great impact on the packaging industry (inks developments, RFID which will become a standard in logistics, on demand printing, internet tools, etc...) but also on our way of living and buying.

First he set the scene with definitions of web 1.0, web 2.0, web 3.0, web 4.0... part of a vocabulary that a short time ago did not even exist. He described the world in which our children will live and showed a video featuring unusual developments that may not be as unrealistic in the future as they appear today.

He defined the many functions of packaging design as follows:

- Sales & Promotion,
- Informing customers



Participants ready to stride along the 30 km of conveyers of the La Redoute site of La Martinoire



- Containing contents
- (bar-) coding products
- Fun, art and entertainment
- Social bonding & making friends
- Identity
- High-tech
- Sending a message

Martijn Arts presented his vision of the future; according to him, buying will be turned into a real experience, informing will become more educational; and containing the content could also mean improving it. Packaging will become more emotional and personalised thanks to new technologies. The technologies which will have a big impact in the coming years will probably be: RFID, Augmented Reality (the ability to see the inside of a packaging thanks to sophisticated RFID labels and sensors), printing on demand, inks (e-inks). Mobile devices will become a must (mainly through the use of the mobile phone).

He also reminded us that 10 years ago, most of what happens on the internet would not have been considered possible, which is why we have to get ready for the future and its unpredictable possibilities....

Some of these futuristic themes can be viewed by visiting the Total Active Media website at www.totalactivemedia.nl

Day 2 - Visit to the La Redoute Facilities in Wattrelos - Tourcoing, France

Philippe Lecomte – responsible for indirect purchasing, gave a very informative and detailed presentation about the activities of La Redoute and of the Redcats group to which it belongs.

The main points concerning the Redcats Group are summarised in Column 3.

He also indicated that 42.2 % of the Redcats Group's sales were generated by internet, but that 45.5 % still come from catalogue activities, with the remainder generated by their dedicated stores. Fashion & accessories is the biggest category with more than 69 % of the sales, followed by home furnishing and decoration.

Following the main presentation an interesting discussion took place about the picking points system which clearly is one of the main assets of La Redoute mail order delivery system.

In the coming months FEFCO is planning to organise a workshop on RFID. The information will be posted on the FEFCO web site.

Facts about the Redcats Group

► General data

- €3.699 billion Sales in 2008
- 48,1% of home shopping sales made on-line in 2008 vs. 4% in 2001
- 51,7% sales originating outside France in 2008 (France: 48,3%; United States: 29,7%; Scandinavia : 8,7 %; Rest of the world: 13,3%)
- 29 million active customers
- 33 million visitors a month on all Redcats merchant sites combined
- 80% of products are designed in-house

► Workforce

- 20 031 employees (end 2008)

► Distribution channels & logistics

- Over 60 merchant websites
- Over 30 catalogues
- More than 600 stores in France and internationally
- A very high percentage of the deliveries are going through the picking point
- Direct home delivery represent a much lower percentage

► Leadership market

- No.3 home shopping company world-wide in fashion and home decoration
- No.1 home shopping in France, Scandinavia and Portugal
- No.1 website in France with laredoute.fr (BtoC, excluding services)
- No.1 women's apparel and n°2 home linen with La Redoute in France
- No.4 children's apparel with Vertbaudet, Cyrillus and La Redoute in France
- No.1 mail order company in plus-sizes and N° 3 catalogue sales in the USA

A big thank you to

From left to right:

- Philippe Lecomte
La Redoute
- Olivier Draullette (ONDEF)
- Gérard Plus (not shown) and
Olivier Lefèbvre (ONDULYS)
- Alexander Enzenberg
Chairman of FEFCO
ComCom





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A new communication, research & networking platform for the packaging value chain



Paolo Pratella,
Managing Director
International Paper
Italy - S3 member

A new Packaging Platform

This new platform, launched on 9 March at Anuga Foodtech in Cologne, brings together companies and individuals from all sides of the packaging sector, including packaging converters, fillers and materials manufacturers with designers, journalists, consultants and packaging buyers. It centres around an interactive website which carries authoritative research and comment from the packaging world and allows members to exchange information online. It also runs packaging events, and provides a launch pad for industry research.

Key industry representatives such as the International Packaging Press Organization (IPPO), the European Brand Design Association (PDA) the European Organisation for Packaging and the Environment (EUROPEN) are partners of the platform and constitute high-level, credible sources of information and expertise.

FEFCO's initial involvement in the Community

FEFCO was present at the first press event of the Community, on 9 March in Cologne, and Paolo Pratella was able to Present FEFCO's European "Common Footprint" initiative in front of 17 packaging journalists.

Achievements

"Packaging at a crossroads"

For the launch of the platform, a major, representative survey was conducted in Europe amongst 650 packaging decision-makers and stakeholders, covering brand, retail and legislative organisations. Under the title "Packaging at a crossroads", it revealed key trends, issues, and evolutions around packaging decision-making, from the marketing, design and environmental points of view.

Fast membership growth

Since the announcement of the website of the Community, on 7 April, 20 000 pages have already been viewed by 5 000 visitors. The membership of the Community is growing fast: on average, 25 new, high level packaging decision makers per day (CEOs, Marketing and Purchasing Directors, Packaging, R&D, Environmental Affairs Managers, Packaging Designers...) register as individual members.

▶ Only 4 weeks after being posted on the web platform of the community, the article "A new Europe-wide standard for corrugated packaging", has already been visited over 2 000 times by packaging decision makers.



- ▶ A detailed and exclusive presentation of perceptions and attitudes of packaging decision makers regarding cardboard-corrugated as compared to other packaging materials will enable better targeted communication of FEFCO's key messages towards packaging decision makers.
- ▶ Further information about the corrugated industry and its initiatives and developments will be displayed via the Community, and the level of interest and type of decision makers will be regularly measured.

For further information:
Please contact Charles Reuland at
c.reuland@thepackagingcommunity.org
www.thepackagingcommunity.org

Update on the Voluntary Agreement to stop the use of DiBP

A year has passed since FEFCO members agreed to sign a voluntary agreement to cease the use of DiBP in their products.

A few months after that agreement was reached, the European Chemicals Agency (ECHA) recommended the prioritization of seven of the 15 substances that were in the Candidate list. Di-butyl phthalate (DBP) was considered as a prioritised substance.

Although, DiBP is not in the Candidate list, it has a similar toxicological profile to Di-butyl-phthalate (DBP).

At that time, most European corrugated manufacturers had already phased out the use of materials containing DiBP and therefore this agreement underlined the importance given by the industry to get DiBP out of the recycling loop.

A number of countries had taken the initiative of advising the general avoidance of DiBP in paper and board as was the case in Germany. Some of our national associations have signed voluntary commitment with their member companies for the same purpose, as was the case in Spain. In France, an agreement was signed at national level, and others like UK corrugated producers have ceased using phthalates in adhesives from 1st of May 2008.

Given the high level of interest in the topic, FEFCO launched a questionnaire in order to assess the measures taken, based on two general questions: What volumes of products contained DiBP in 2008 and which products were they?



The results of the enquiry were very encouraging as was the number of answers from associations and also from companies. We have summarised the situation. The main conclusion is that most of our companies are no longer using DiBP in their products, which basically means that the corrugated industry is making every effort to cease the manufacture of products with DiBP.

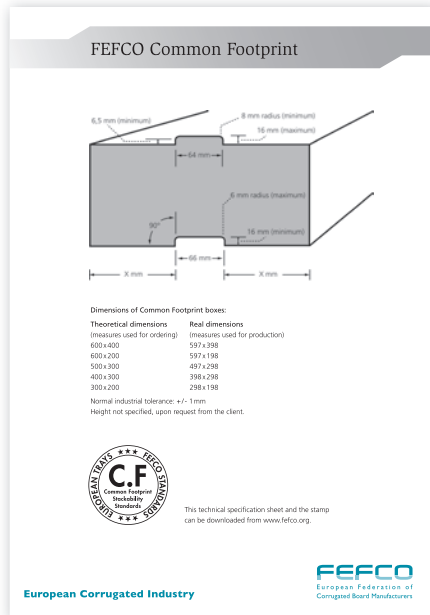
For more information, please contact Maria Casado at maria.casado@fefco.org + 32 2 626 98 36



FEFCO Activities

▶ New CF Technical Specification Sheet

This document can be downloaded from www.fefco.org. Simply go to the FEFCO's home page, click on the CF stamp and then look for the downloads at the bottom of the page.



▶ Retail Powerpoint Presentation

FEFCO/S3 Committee prepared a short FEFCO Retail presentation with speaking notes which could be used for appointments with Retailers, CEO's or with other important decision makers within European Retailers. This presentation can be downloaded from the Members only area of the FEFCO Web site.



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

Calendar of Events

▶ CITPA Strategy Workshop

8 June 2009 - FEFCO offices

▶ FEFCO Summit

This summit is a merge between the FEFCO and the marketing Congress 22-23 April 2010
Barcelona, Spain
www.fefco.org

Industry Events

▶ India Corrugated Show 2009

8-11 July 2009
Pragati Maidan, New Delhi, India
www.indiacorrugatedshow.com

Other Events

▶ BalkanPac

2-5 June, 2009
Sofia, Bulgaria
www.viaexpo.com

▶ ProPak Asia 2009

17-20 June 2009
Bangkok, Thailand
www.propakasia.com

▶ EuroPack 2009

24-26 June 2009,
Monte-Carlo Monaco
www.europacksummit.com

▶ ProPak China 2009

15-17 July, 2009
Shanghai, China
www.propakchina.com/en

▶ PPMA Show

29 September - 1 October 2009
NEC Birmingham, UK
www.ppmashow.co.uk

▶ Pakfood 2009

14-17 September 2009
Poznan, Poland
www.pakfood.mtp.pl

Strategic Alliance

▶ Global ICCA Forecast 2008

The document is now accessible for download from the FEFCO member only web site.



www.fefco.org 12.000 monthly unique visitors!



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