



The future is bright.
The future is corrugated!

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Angelika Christ
FEFCO Secretary
General

Another successful FEFCO technical Seminar is over - continuing the trend of the past 10 years to always top the previous event in number of participants, positive feedback and interesting discussions.

Technical progress also means adapting to current economic feedback. What do we know from the market?

In 2017, we have excelled as far as volume is concerned: per working day we reached an increase of 3.3% in square metres from January to September, compared to the first three quarters of 2016. The big winners included Germany, Poland, Spain, the UK and Turkey.

Online trade is one of the big drivers of volume increase; some statistics say that it already exceeds 16% of overall trade in Europe. This has an impact on our industry, since most online orders are packed in Corrugated. And we expect further increases in the future. In Germany alone, online trade grew by 9% percent during the first three quarters of 2017.

This sector will continue to have a major impact in the future, but other areas will also have an influence. Digital printing allows for personalised packaging and targeted messages, and changes will not only take place with regards to new technologies, but will also change processes and affect our way of working.

The water in the wine comes from our raw material, from paper: demand exceeds supply, and the market does what is normal in such a situation: paper prices remain on a very high level, and there is no light at the end of the tunnel. The marketplace has been swept empty. Lucky for those companies that are integrated and can profit from a stable supply and the great market on the paper side.

Europe and the world economy are booming, so it is no surprise that studies forecast "the world demand for Corrugated Board Packaging will increase steadily over the next five years". A good perspective, but full of challenges - the Corrugated world remains interesting!

Corrugated industry wraps up perfect package at FEFCO's Vienna seminar

Europe's corrugated board industry hit all the high notes as it wrapped up three intense days in Vienna on October 11-13, showcasing new technologies with their business partners at FEFCO's Technical Seminar.

It is definitely the only platform in Europe dedicated to the corrugated industry that combines seminar sessions, presentations of suppliers' innovations with a well-attended exhibition.

The Vienna event was one of the most popular in the 36 years since FEFCO has been holding this seminar on a two-year basis. There were 126 stands (compared

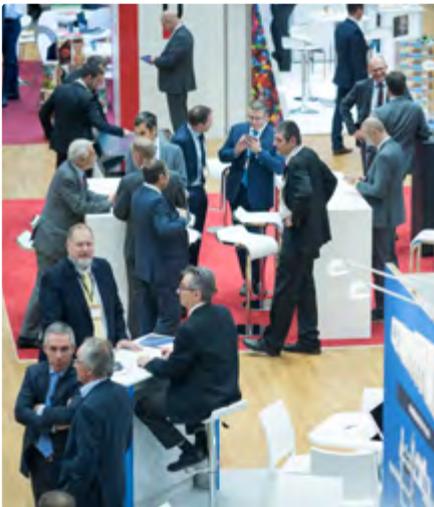
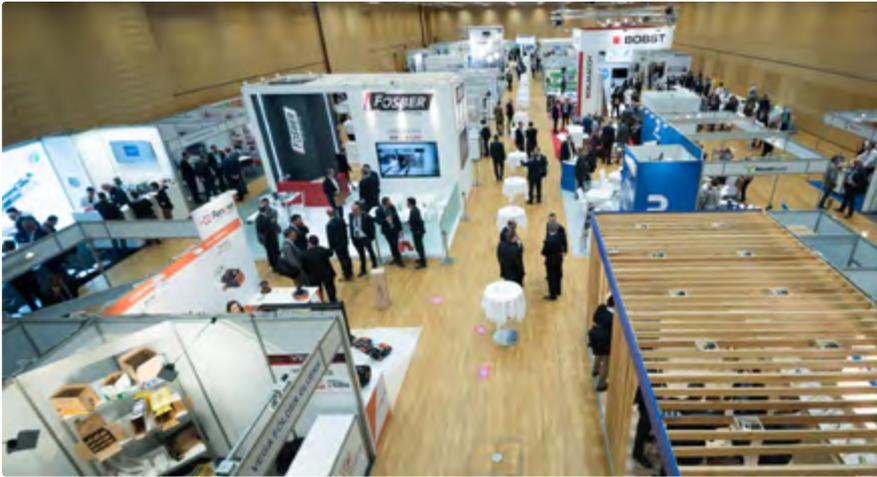
with 110 two years ago), 87 exhibitors on hand (compared with 76), more than 1,000 people attending the seminar at the Messe Wien Congress Centre.

FEFCO President Jan Klingele, Managing Partner of Klingele Papierwerke, said the corrugated industry was enjoying an extraordinary transformation as new technologies swept through the sector,



Jan Klingele, FEFCO President





including digital printing, intelligent automation and big data. "It's clear that as our clients are moving into industry 4.0, we will have to adapt. We need better, faster and safer ways to meet customer demand," he said.

He said that in the 19 times since FEFCO has held the event since its first technical seminar in Amsterdam in 1981, it had grown into a must attend industry event, that one cannot miss! "And it was here, in 1814, that the Congress of Vienna was called to solve the problems of Europe in the aftermath of the Napoleonic wars", he said, adding that the gathering two centuries ago created a long period of peace in Europe, while setting up rules on trade, transport and even packaging.

The seminar, entitled 'Corrugated Processes Complexity – Challenges

and Solutions', included discussions on how to build lighter, stronger and more environmentally-friendly boxes and how to exploit new production technologies. Participants debated industry trends, from the latest customer demands to innovations rolling out on the market.

FEFCO Secretary General Angelika Christ joked about the "blood, sweat and tears" typically involved in organising such events. "But there was no blood, there were no tears," she said. "Over the last few days I could see a lot of sweat, and instead

"The setup was perfect. To reach the conference room delegates had to pass by our stand, meaning we reached most people."

Chris Wolters, Tresu Group, Denmark

2017 FEFCO Technical Seminar at a glance

- 1001 delegates
- 39 countries
- 89 exhibiting companies
- 126 stands
- 22 speakers
- 60 spotlights presenters
- 20 journalists
- 6 suppliers' awards
- 2 lifelong achievement awards
- 686 mobile app users
- 24.9 k pages viewed

 **FEFCO**
Technical Seminar
11-13 October 2017 - Messe Vienna



Krassimira Kazashka, FEFCO and Marc Van Damme (Production Committee Chairman) moderating the spotlight sessions



Klaus Lücke, PC member



Production Committee members moderating a session: Antoine Renaer, Łukasz Nęcki, Julian Pachniewski

of tears, I saw overwhelming smiles honouring the efforts of many people that worked hard to make this event a real success."

Audience members were entertained by performances from traditional Austrian yodellers, jugglers spinning cardboard boxes, body-popping dancers, and live drawings from a sand artist.

The speakers at the seminar offered many different perspectives on the innovations transforming the sector, and the challenges ahead. There are many new technologies that are emerging which could change the corrugated product itself, including nanomaterials that could make the paper super-hydrophobic or give it antimicrobial properties.



Sean Smyth

Sean Smyth from Smithers Pira gave an overview of the market and trends in print and specifically in digital print, saying that market changes were being driven by changing customer

demands. "It's what they want that matters," he said. Packaging is a big business, globally worth \$760 billion in 2016, and \$184 billion in EMEA, Smyth said. The printed packaging business was worth \$380 billion in 2016, of which \$130.1bn in corrugated.

Smyth predicted that digital print for packaging would rise from a \$13.2 billion market in 2017 to \$23.2 billion in 2022, as major producers began competing. He said it would help change the customer

relationship with the package. "When you open a printed box, it is an event for the customer. A plain brown box just doesn't do it," he said, predicting that stores would soon be more creative with corrugated boxes on stacking shelves. "Understand the market dynamics: it is more than 'just a print device'. It is increasingly competitive, and will be more so," he said. "Change the topic from cost reduction to value-added."

"I think that the location was excellent. Vienna is a nice city and the Messe was perfect. An excellent combination of city and event."

Kevin McLaughlin, Flexo Concepts, USA



Mark Hanley

Mark Hanley from IT Strategies looked at the pros and cons of post and pre-print corrugated production. "Everyone in this industry is learning. Digital printing is very high

tech and very investment intensive. Step-by-step is our advice!" he said. Hanley said digital production print is a great idea economically, and closer to consumer demand for ever more retail-oriented corrugated. He noted that many current digital machinery offerings come from reliable and reputable vendors with a high degree of experience and understanding. But he warned against assuming each side knows all the issues, or that they know how to resolve the issues that may emerge in

the shift to digital. "Inkjet, in particular, has a lot to prove in any format with respect to true economics, speed and capacity to handle the requisite substrates and remain reliable," he said.



Richard Coward

Richard Coward, VPK's Managing Director for Rigid Containers, talked about how the pace of change is ever accelerating, and how this is affecting demand, especially

with retailers. "We have a split in our product demand driven by our customers, and our customer's customers," he said. "Most plants for the foreseeable future will have to be agile – equally adept at long and short runs, as well as simple and complex products." Coward said digital may have a significant part to play but there is still a lack of clarity as to where it fits. "Digital still only accounts for 2% of packaging printing: why?" he asked. "We need the courage to invest but the wisdom to invest carefully in an ever-changing marketplace."



Sergej Luzin

Sergej Luzin from Mondi said that in the future, the industry will have paper that uses nanomaterials that could be super-hydrophobic or have antimicrobial properties. Science

was offering many ideas for better paper, he said, with the Xylanase enzyme being

used for bleaching, special solvents being used for lignin extraction, and nanomaterials that can change their colour, melting point and magnetic properties depending on the particle size. That could, for example, be used to enhance labels so that they react to the aromas or the temperature of the products inside the package (offering a more accurate best-before status).



Robert Tschullik

Klinge Technical Project Manager

Robert Tschullik

welcomed the application of big data to the corrugated sector, saying the mass of information from the industry was focusing on the speed, load on the belt, power consumption, and water



Steve Parr (PC Member) moderating the Question & Answers session with the speakers

consumption. That could mean faster production, less heat transfer, and better-quality board, he said.

“This was my first time at the Technical Seminar and this event was an eye-opener for me.”

Sami Hänninen, DS Smith Finland

HP Gold Box Sponsor



HP sponsored the welcome cocktail reception on Wednesday 11 October 2017, with the participation of Eviata Halevi and Ronen Zioni. HP also organised two sessions dedicated to different aspects of digital printing for corrugated.



Tereos Bronze Box Sponsor



Tereos sponsored the seated lunch on Tuesday 12 October.



A bit of local culture and entertainment



Andreas Syska

Andreas Syska a professor from the Hochschule Niederrhein University of Applied Sciences, said that while talk of industry 4.0 was a hype, he did not consider that to

be a problem. "Hype attracts attention and creates budgets. Even though there are peaks of inflated expectations (followed by a trough of disappointment) there is a plateau of productivity that emerges at the end," he said.



Marc Van Bosbeke

Marc Van Bosbeke, VPK Packaging's Process Engineering Manager, talked about specialisation on corrugators. "The perfect corrugator is one that has more stability and

consistency. Like a coffee machine, it should be something we just plug in," he said. He urged buyers who specialise in small runs at relatively low speeds not to go for a high-speed machine with high heat capacity and an enormous inertia.

"One-size-fits-all does not exist, so specialise," he said.



Harre Medemblik

Harre Medemblik, Pro-corr's founder and owner, explained his findings from over 300 visits to corrugator makers. "Bad habits are passed on, flawed processes are

accepted," he said, pointing to challenges related to reduced weight, coated paper, requests for improved printability, and just-in-time deliveries. He described a cycle that leads to the wrong use of pre-heaters and pre-conditioners. "There is a vicious upwards spiral: more glue, more heat, more glue, and more heat, and on and on," he said.

"Very good location - well organised - well equipped and excellent staff"

Christopher Parr, Avanti Conveyors, UK



Dan Brunton moderating the panel discussion (in the middle). From left to right: John Kelley, Dusobox - Nick Kirby, Swanline Print Group - Marcel Heller, Model Group - Dan Brunton, Brunton Publications - Steven Hollingsworth, Cepac Group - Sean Smyth, Smithers Pira - Mark Hanley, IT Strategies.



Jean Pascal Bobst

Bobst Chief Executive Officer **Jean Pascal Bobst** said that his firm was developing a new generation of printing machines. These printers would be ultra-high

precision, with positive and negative line printing, anti-counterfeit security printing, invisible coded messages, and ultra-high resolution for brand protection and tracking, Bobst said.



Michael Frey

Rondo Chief Technical Officer **Michael Frey** talked about meeting customer demand for zero defects. He noted that boxes are commodities, and

suppliers have few opportunities for differentiation, making them easy to replace. "Are we always sure that we completely understand the customer's requirements?" he asked. "Are we prepared for quality agreements with our customers? Do we have the knowledge? Should we have common standards?"



Stefan Buchner

Stefan Buchner, Smurfit Kappa's Senior Manager for Health, Safety and Environment (and also Chairman of the FEFCO Health and Safety Committee)

urged the users to report and share accident information, as it would help the entire industry. "All information will be shared anonymously, and statistics will be shared with companies that provide statistic information," he said.



Krassimira Kazashka

FEFCO Technical Director **Krassimira Kazashka** looked at the regulatory issues, including mineral oils. With consumers demanding products free from mineral

oils, and the corrugated industry committed to use mineral oil-free printing inks, this is an obvious alignment of purpose, Kazashka said, but efforts are needed to target the issue at source.

Success was well-deserved after the hard work of the Production Committee and FEFCO team

Once again, the FEFCO Production Committee (PC) can be proud of the results of the last Technical Seminar. With probably one of the highest attendance rates for many years (in fact we cannot find any record of ever having had so many delegates), the programme was of a very high standard, and the group worked in perfect harmony. We all know that the success of the seminar is down to the



tremendous dedication and involvement of all members of the committee. The man behind this fantastic team work, the master of the ceremony, is Marc Van Damme, the chairman of the Production Committee. Marc and his team all deserve congratulations for what they achieved and for their exceptional work and energy!



"The technical seminar in Vienna has proved once again, the agility and positive mood within our industry"

Marc Van Damme

Looking ahead



If you participated in the seminar, we really hope that you increased your knowledge about the industry, met new customers and suppliers, and enjoyed pleasant moments with your peers. Now it is time to look back and to analyse the feedback you have given us; your comments and suggestions are vital for FEFCO in our quest to always improve.

We will do our best to take them into account when preparing the next event, to ensure the ongoing success of our seminars as we strive to improve our services for members.

Corrugated industry's top players recognised at FEFCO's Vienna seminar with special awards

At the end of the three-day Technical Seminar, FEFCO Production Committee, chaired by Marc Van Damme, issued 5 awards selected from the 55 Spotlights presented on 11 and 12 October and honoured some of the most innovative and exciting corrugated industry suppliers' projects.



Yves Bletterie, BOBST - Angelika Christ, FEFCO - Thomas Murr, BHS

The most prestigious FEFCO award was for **Best Innovation**, and this year there were two gold winners: **BHS**, for their new single facer Modul Facer MF-A. The FEFCO jury said this offered, "a solution to the ever-increasing complexity on flute changes. The Modul Facer MF-A makes it possible to change flute positions in a very flexible way, without losing all the advantages of the traditional module facer." BHS's Thomas Murr collected the prize. **BOBST**, for their introduction of the online gap control on bundled boxes. The FEFCO jury said Bobst, "was taking the request of our industry seriously to check the gap control on boxes after the counter ejector." This could help the industry reach the goal of zero defect deliveries. Bobst's Yves Bletterie picked up the award.

A **bronze Innovation Prize** went to **Fosber**, for their new Pro/Care, which the FEFCO jury said was "bringing to our industry a structured, well defined comprehensive approach on collecting and analysing available data." It was handed to Fosber's Tim Straker.



Tim Straker

The **Best Presentation Award**, out of some 60 six-minute spotlights delivered during the Vienna seminar, was won by **Göpfert**, Lena Bördlein collected it for her presentation, 'Göpfert, the Next Generation'.



Luca Lui



Lena Bördlein

The **Most Inspiring New FEFCO Member Award** went to **Elitron**, which has moved from a supplier of digital cutting tables for Italian leather to the worldwide corrugated industry. It was handed to Elitron's Luca Lui.

The **Sustainability Award** went to **Metsa Board**, which has invested in a next-generation bio-product paper mill in Finland, proving that businesses can support the goals of the circular economy goal by cutting the carbon footprint of paper production. The award was collected by Metsa Board's Leena Ylinimie.



Leena Ylinimie

Two distinguished industry managers with extensive experience were rewarded for their remarkable industry contribution



Renato Rossi

For the first time the FEFCO Production Committee recognised the contributions of business leaders to the industry. FEFCO's first ever **Lifetime Achievement Awards** were presented to two business leaders. The first award went to BP Agnati's **Renato Rossi**, "in recognition of his lifelong commitment to developing the corrugator, enhancing the single facer to process lightweight papers and introducing 'colder' corrugators," according to the jury citation.

The second went to **Daniel Tatti** from Bobst, "for his long-term research and innovation in the field of printing, developing solutions for the Corrugated Industry."

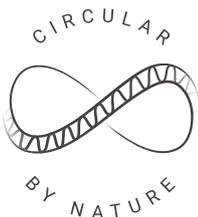


Daniel Tatti



EU Activities

Key EU policies with an impact on the corrugated industry continued to evolve in 2017, requiring the active involvement of FEFCO and a rapid response.



The Circular Economy and the Waste Directives review is one of big packages FEFCO was involved with during the course of the year and at

different political levels. The Parliament adopted their position in March 2017, supporting innovation and bio-based recyclable materials, while demanding very high recycling rates for paper and board packaging. In May 2017, the Council of the European Union announced their negotiating position, which had a different focus and threatened the internal market legal base of the Packaging and Packaging Waste Directive. The entire packaging industry in Europe joined forces in opposing this change which could have an undesired destructive impact on the single market for packaging and packaged goods in the longer term. The European Commission, the European Parliament and the Council are currently in triologue negotiations at political and technical levels. The results, which are expected in the beginning of 2018, should be a compromise proposal that is acceptable to all involved parties.

The circular economy is a key policy area for corrugated due to the impact it has on the business of our members and also due to the fact that corrugated packaging is the perfect circular product. "Corrugated is circular by nature!" is the main slogan

of the campaign FEFCO ran during 2017. Corrugated is based on renewable resources, is recycled after use and the market for using recycled paper to make new corrugated packaging over and over again is well established. The corrugated industry already contributes significantly to EU ambitions on the recycling of packaging waste.

As part of the circular economy package, the Commission is expected to release in December 2017 a EU Plastic Strategy. The strategy is supposed to focus on plastic and propose measures such as improving the current (low) level of recycling and fighting marine litter. However, the measures proposed may have an impact on the entire packaging industry, including corrugated.

"Resource efficiency: reducing food waste and improving food safety" is an own initiative report adopted by the European Parliament in May 2017. The report clearly shows the need for action at European level and the strong engagement of the institutions. Even though most food is wasted at the point of production and use, the corrugated packaging industry already provides packaging solutions that help to reduce food waste in the logistic supply chain, in the supermarket and at the consumer's place.

Food contact materials is another important area for our industry, as corrugated packaging is widely used in food packaging applications. Following the proposal from Germany for the Printing Inks Ordinance (2016) the European Commission announced its intentions to work on a new EU regulation for printed food contact materials. Corrugated packaging, as a printed food contact article, will clearly fall within the scope



of this new measure. The development of this regulation is still in process and our expectations to see a first draft at the beginning of 2018 might be too ambitious. FEFCO continues to closely follow the process and engage in stakeholder discussions with industry and the Commission to protect the members.

At national level, several countries continued to work on the issue of mineral oils, finding a solution is a high priority for the corrugated industry. Germany proposed a forth draft ordinance, which focuses only on the aromatic fraction. The French agency ANSES made an evaluation reaching a conclusion that all sources should be targeted in order to reduce the amount of mineral oil in the system. Most corrugated packaging has already changed its inks to water based solutions.

In 2018 our expectations are to see the finalization of the Waste Directives and a first draft of the new regulation on printed food contact materials. We will continue to closely follow all EU activities and policies that may have an impact on the corrugated industry.

Carton Ondulé de France (COF) unveils its new logo and website

To promote the intrinsic properties of this versatile material and its ability to adapt to present and future needs, the French federation for corrugated, Carton Ondulé de France, has created a new logo and tagline to promote corrugated packaging.

The new logo is designed around the letters C (for "carton" which means board) and O (for "ondulé" which means wavy and refers to the fluting).



The logo also reflects the infinity symbol, symbolising the circular nature of corrugated packaging.

The new tagline **"Corrugated board, the good genie of business!"** is a reference to all the many benefits of corrugated packaging:

- renewable, bio-degradable and recyclable
- combines the qualities of strength and lightness
- space and stacking optimisation in transport
- protects, preserves and insulates the goods it carries
- customisable - size and design tailored to the needs of the customer
- an effective marketing tool - advanced printing methods promote brands, provenance and producer know-how.

These are just some of the reasons why so many suppliers and retailers choose corrugated. And with the growth in e-commerce and changes in consumer behaviour, we see it being used more and more in other sectors too. As such an adaptable product, corrugated is ideal at meeting new needs and expectations.

New logo



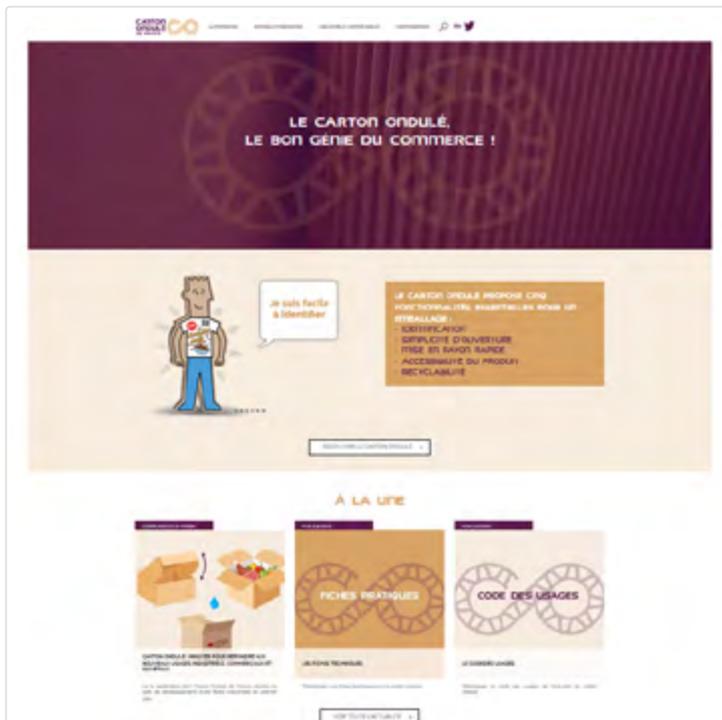
The tagline translates as "Corrugated packaging: the good genie of business!".

**LE CARTON ONDULÉ,
LE BON GÉNIE DU COMMERCE !**

COF also has a presence on social media, you'll find them on Twitter [[@CartonOnduleFR](#)]. Please also visit their new website at [cartononduledefrance.org](#).

You can help them spread the message about the many benefits of corrugated by retweeting posts and visiting their twitter account and website regularly!

You'll see that some of the elements from the FEFCO campaign have been incorporated into their campaign. This shows how the campaign can be effectively adapted at national level without losing its identity. On the contrary, it is enhanced with new features!



For additional information please contact:

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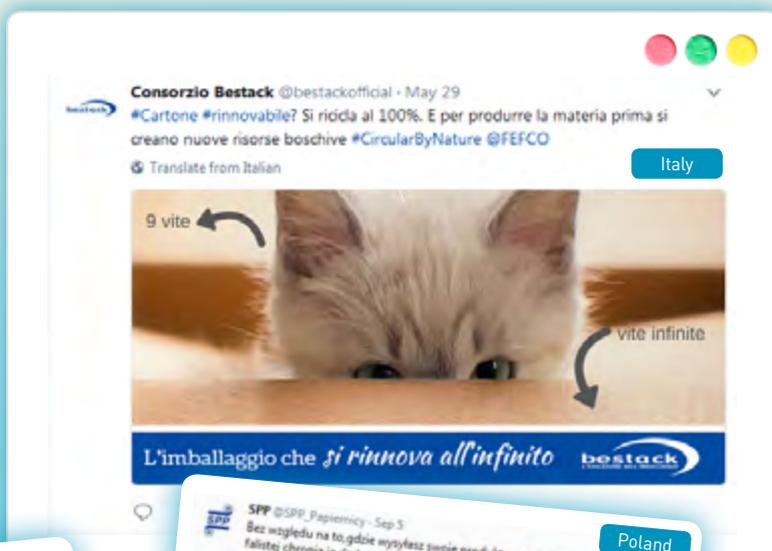
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[@CartonOnduleFR](https://twitter.com/CartonOnduleFR)

How national associations are spreading the Circular by Nature messages

Many of you have probably seen elements of the 2017 Circular by Nature campaign which was launched in March during a joint FEFCO/Euractiv event. Since then, it has spread across Europe and has been widely shared on various social media channels. With the appropriate online tools, the industry can be more visible if all actors join forces. We are now able to effectively relay each other's messages and promote the indisputable benefits of corrugated packaging!

Please join us in these efforts and visit our web page dedicated to the campaign at:
www.fefco.org/circular-by-nature.

And remember to follow FEFCO and all the corrugated packaging organisations active on Twitter and Facebook!



FEFCO Activities

FEFCO Board

In September 2017, **Mehmet Nuri Gorenoglu** was nominated the permanent representative of OMÜD (the Turkish Corrugated Cardboard Industries Association) on the FEFCO Board. He is also the President of OMÜD.

RAC

John Swift, FEFCO Regulatory Affairs Committee Chair, was presented with an "ISO Excellence Award" after around 30 years of involvement with standardization activities at national, European and international level, including the ISO (International Organisation for Standardisation).

In his work at the ISO, John has been a leading expert in committees working on environmental labelling and the development of standards for both carbon

and water footprints. Most recently he has been the co-leader of a working group which has developed an ISO standard for the communication of footprint information. This group completed its work at a meeting in Canada in June this year and John decided that this was a good point to retire from his involvement in international standardization.

At this occasion, the Chair of the committee, Daniel Trillos from Columbia, honoured him with the ISO Excellence Award in recognition of his long service to standards development. The certificate now has a prominent place on his office wall and will be one of the items he will retain with pride when he goes into retirement early next year.

CITPA News (International Confederation of Board Converters in Europe)

Richard Coward, VPK/Rigid, was nominated the new CITPA President, succeeding Bob McLellan who has held the position for the past four years.



Events

FEFCO Summit

23-25 May 2018,
The Brewery Conference Centre
Stockholm, Sweden



PharmaPack

7-8 February 2018
Paris Expo, Porte de Versailles, France
www.pharmapackeurope.com

Fruit Logistica

7-9 February 2018
Messe Berlin, Germany
www.fruitlogistica.de/en

Empack 2018

28 February - 1 March 2018
NEC Birmingham, Birmingham
www.easyfairs.com

PACE

Packaging and Converting Executive
Forum Europe
6-8 March 2018
Amsterdam, the Netherlands
www.arena-international.com/pace

Live Retail Week

7-8 March 2018
Intercontinental London, The O2, London
<https://live.retail-week.com>

Internet Retailing Expo

21-22 March 2018
NEC, Birmingham, UK
<http://internetretailingexpo.com>

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