



Munich 2011
Were you there?

 **FEFCO**
Technical Seminar
23-25 March 2011 Munich

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Walter De Smedt,
Chairman Production
Committee

Dear Colleagues,

“The most successful Technical Seminar for many years” – hearing that comment (one of many positive remarks) after the Technical Seminar in Munich made me and the whole team involved feel very happy and proud. Happy for the industry that now feels confident with the platform FEFCO provides to suppliers and to the industry. Happy for the Production Committee that invested many hours in preparing a first class programme. And happy for the FEFCO team who created professional procedures and a smooth organisation on-site.

Of course, numbers were flattering as well: a 40 % increase in industry participation at the conference, remarkably higher participation at the exhibition and sponsors that used the opportunity to promote their company and products.

Furthermore, hearing that members are already internally working on some of the issues brought up at the seminar shows us that the three columns which a good event should provide have worked in Munich:

- The right people had the chance to meet and network; the increasing number shows the value given to the Technical Seminar;
- The programme was challenging, content was even interesting enough to be implemented at company level;
- The site was great and the spirit Olympic.

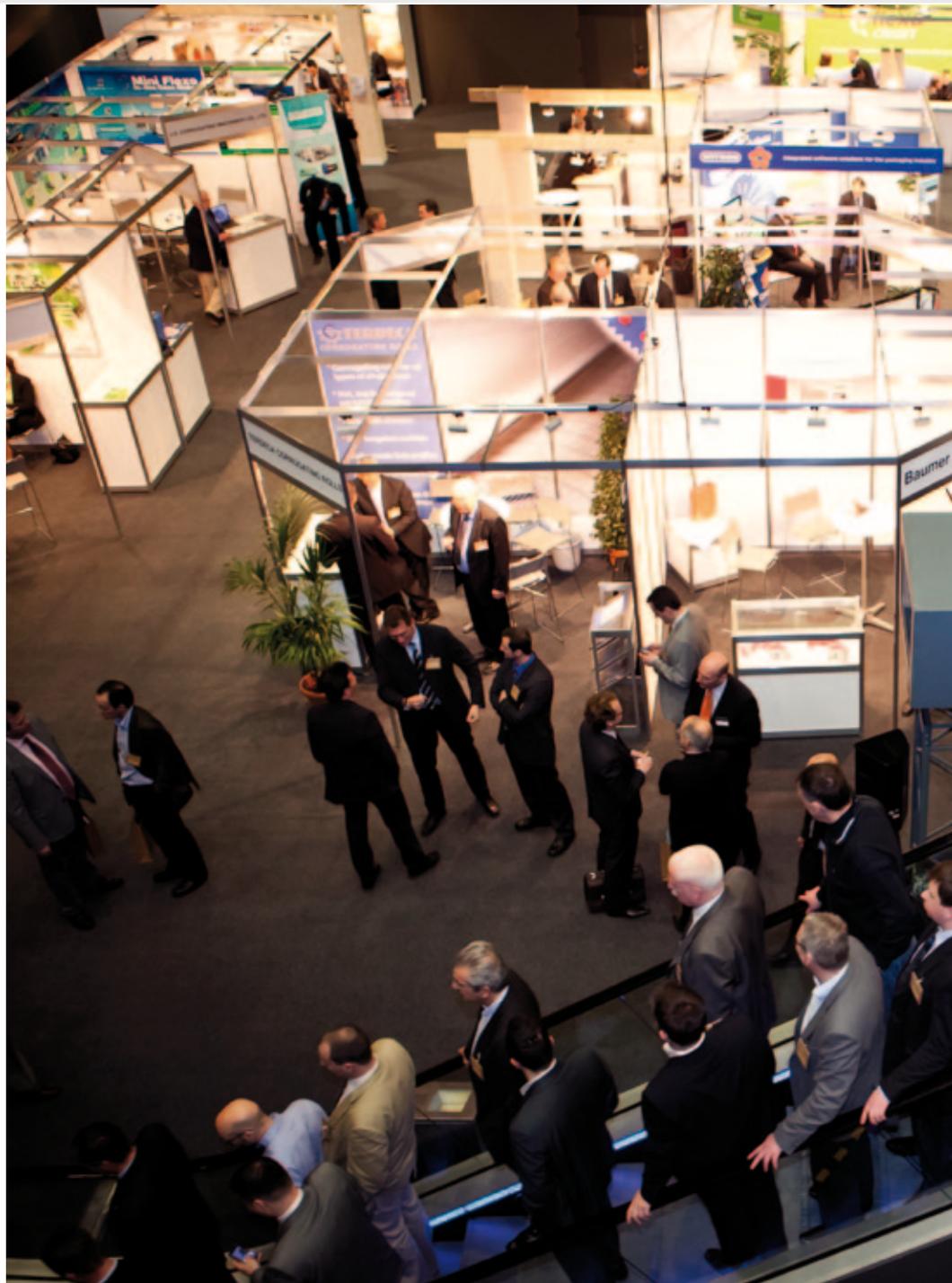
On top of that, throughout the seminar, the sun provided a spotless blue sky.

The great results bear an obligation: we have to provide better results next time – what a challenge!

The next Technical Seminar will take place in the fall of 2013. Where? We will have to decide. As usual, there will be a meeting of those members interested (both corrugated and supplying industry) to discuss location and improvements; we hope for good creative input.

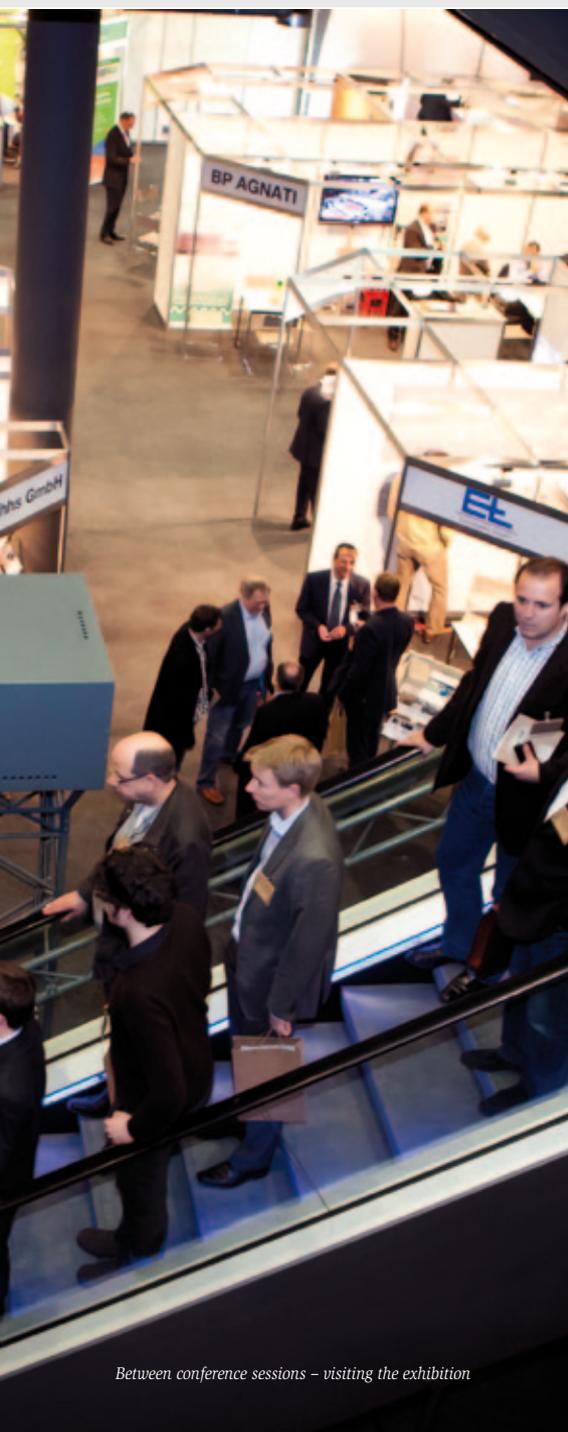
I thank all those who invested their free time, energy and thoughts to make the Technical Seminar in Munich such an unforgettable event!

FEFCO 16th Technical Seminar Munich, Germany



23, 24 and 25 March 2011
Event Arena

 **FEFCO**
Technical Seminar
23-25 March 2011 Munich



Between conference sessions – visiting the exhibition

Munich 2011 – a resounding success!

'One of the best ever' was the verdict of one of the participants of the sixteenth FEFCO Technical Seminar held recently at Munich's prestigious Olympiapark. The venue was the Event Arena, originally built as the Velodrome for the 1972 Olympics but now housing a world-class conference and exhibition centre.

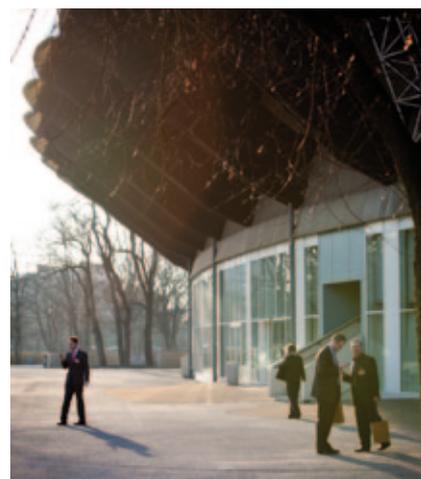
Taking place from March 23rd to March 25th, the 2011 event was described as a resounding success, both by the corrugated industry delegates and the representatives of the exhibiting companies.

This event proved to be extremely popular, as demonstrated by the statistics on the right. It is still the only conference and trade exhibition in Europe, regularly bringing together buyers and suppliers of corrugated packaging machinery, equipment and services. Not only were the exhibitors satisfied with the number of delegates visiting their stands, but they were also impressed by the fact that so many of them were the key decision-makers.

Most delegates took every opportunity to network, but there was also a chance to relax over drinks and canapés at the very popular cocktail party hosted by Apex, a major sponsor of the Seminar.

**"Great job done by all -
Congratulations to staff
and to all involved from the
Production Committee"**

Bob McLellan, FEFCO President



**FEFCO Technical Seminar
23-25 March 2011
Event Arena Olympiapark**

- **650** delegates
- **50** industry guests
- **40 %** higher participation from the corrugated industry
- **46** spotlights presentations
- **89** stand units and
- **64** exhibiting companies
- **160** stand personnel
- **38** countries

Cocktail – Apex Group of Companies



Networking and enjoying a glass together at the Cocktail sponsored by Apex on Wednesday 23 March 2011.

Theatre Mobile

Each session began with a performance by Theatre Mobile, who were so popular at the 2009 Berlin Seminar, using an ingenious combination of mime and on-screen presentations that exactly matched the flavour of each conference theme. They brought motion to the stage and created a nice and relaxed atmosphere.



Since 2009 in Berlin, the corrugated industry has emerged from a global recession, leaner and fitter than it was at the start. At the same time, there have been significant increases in costs, for example in the cost of raw materials and energy, all of which puts pressure on margins.

Recognising this, FEFCO's Production Committee, chaired by Walter De Smedt, put a lot of effort into formulating a conference programme that would give members plenty of food for thought, with a significant emphasis on highlighting opportunities to drive out cost by improving efficiencies. The Committee also listened to the concerns of FEFCO members, and the content of the conference agenda was formulated to reflect their priorities, covering three key areas:

- Efficiency in maintenance, production and logistics, including such topics as lean manufacturing, the use of RFID and high storage solutions for finished products;
- Best use of raw materials, with a special emphasis on the reduction of waste and the use of innovative pack design and lightweight materials to drive out cost;

Spotlight Sessions

The Spotlight Sessions, also popular at previous Seminars, featured even more prominently this year, with no less than 46 companies taking the opportunity of seven minutes of fame on the conference stage. Their

performances were closely scrutinised by the Production Committee, and in Friday's closing session, prizes were awarded for Innovation, Sustainability and for the Best Presentation.

Angelika Christ, FEFCO Secretary General, presented the following awards:

Best Innovation



Gold Award
Göpfert Maschinen GmbH "Latest News in High Quality Printing" presented by Ralf Schiffmann. This innovation consists

of a high quality post print equipment offering speeds that are 40% higher than any comparable machine.



Silver Award
BHS for its "Zero Defect System" presented by Thomas Murr. The presentation convinced the jury that it will help the corrugated

industry to further improve its quality and get closer to its zero defect target!



Bronze Award
Fosber SpA for "M3 Liberating Wet End" presented by Tim Straker. The concept of the M3 system for reel stands/

splicers was considered by the jury to be a step further in automation of the wet end, reducing manpower and therefore promising cost reductions.

Sustainability



Flexo Concepts "Microclean" by Dave Burgess won the special Sustainability award for its innovative "Microclean anilox roll cleaning system".

Best Presentation



The clear winner were Martin Müller and Alfred Kugler, from Gerd **Mosca AG**, with their quick-fire question and answer presentation entitled "Sustainability Meets Efficiency".

"Good initiative to allow suppliers to briefly present new developments"

Bart Verbruggen, OM Partners, Belgium.

- Corrugator process control, giving an insight into the opportunities provided by the use of modern techniques to optimise productivity.

Opening the first session, FEFCO President Bob McLellan highlighted the changes that have occurred throughout the thirty years that he has been involved in the industry. Production speeds and the quality of corrugated products have improved beyond recognition, and packs are now lighter and stronger, with standards of multi-colour

printing that would not have been dreamed of possible thirty years ago. Furthermore, safety records have improved drastically, and environmental concerns are being taken far more seriously.

The conference programme at Munich gave delegates the opportunity to catch up with new developments in technology, which have moved ahead so rapidly even in the two short years since the fifteenth seminar was held in Berlin. Our industry is moving closer and closer to that elusive



Bob McLellan congratulates Angelika Christ and her team



goal of 100% perfection, aided by the very latest improvements in the quality of raw materials, in the performance of corrugating and conversion equipment, and not least by the mind-blowing possibilities now being offered in the area of logistics and process control.

“Superior, professional and good quality of attendees”

Peter Dobell, Solarsoft

There was a buzz around the Munich Event Arena, from the moment the exhibition and conference sessions commenced on Wednesday, until the delegates left for home and the exhibitors packed away their stands on Friday afternoon. That buzz was a reflection of their satisfaction with their week's work, and of the confidence with which the European Industry is now facing the future.



Jeanette Hartwig (AMC) forecasting production bottlenecks with computer simulations



Arco Berkenbosch (Smurfit Kappa Corrugated Division) says 'We must sell packaging performance'



Marek Motylewski (Mondi Swiecie Paper Division) Lightweighting by Rightweighting

Comment from Walter De Smedt



“A great deal of planning went into this 2011 Technical Seminar, and a lot of credit must go to each and every member of the Production Committee for its success. They had to agree which subjects would be covered, and then arrange for the best available speakers to take part. That wasn't the end of it – they were also very careful to ensure that each of our speakers kept to a very specific brief, so that we avoided any repetition of topics. Production standards are rising all the time, and the only way to keep up the momentum in our search for perfection is by using the very latest planning and production technology. That is what we had on offer in Munich – the best of technology, presented by some excellent speakers and by some of the corrugated industry's leading manufacturers. All the indications are that we did a good job!”

Feedback from the online survey

- **24 %** of respondents found the event was above their expectations
- **65 %** rated the event very good and **20 %** rated it excellent
- Respondents said they were attending:
 - › **Firstly** for the conference session,
 - › **Secondly** to see new product & technology and for networking
 - › **Thirdly** to see and meet suppliers



“All this was made possible thanks to the Production Committee members the one and only “FEFCO BCT Team”!”

Walter De Smedt



From left to right: Richard Höfer, SCA Packaging Welpa, Roland Fritz, SCHELLING, Laszlo Koscsó, Rondo, Petri Kaartinen, SCA Packaging Finland, Julian Pachniewski, VDW/ FEFCO, Walter De Smedt, Smurfit Kappa Group, Marc Van Damme, VPK Packaging, Pawel Rogalka, AQUILA, Henry Tan, International Paper, Kurt Jensen, Smurfit Kappa Denmark. Not shown: Dominique Lagarde, Smurfit Kappa & Dave Rich, DS Smith

Social Media in the Workplace

Balancing risks and benefits

Many Companies realise that access to social media platforms can present great opportunities in developing and improving customer relationships, increasing sales and providing a free source of marketing and advertising. As a prerequisite online activities should be related to job's duties.

Nevertheless, for security and productivity reasons, some CEOs are reluctant to allow employees to access social media platforms. However the trends are there and the failure to use these new online tools can put a business at a major disadvantage relative to its competitors.

Millions of people now have access to the internet and in particular to social media platforms. For example social networking sites such as Facebook, LinkedIn and Twitter have exploded in popularity with 500 million users (Wortham, 2010), but the question is what is the best way to use these platforms for business?

Key trends and research findings

Extracts from two recent surveys highlight interesting conclusions regarding the attitudes towards social media. The results show that, whatever the situation is, the increased usage and trends in social media cannot be ignored.

European Communication Monitor Survey – 2010

This survey is the most comprehensive analysis of communication management and public relations worldwide, with 1,955 participating professionals from 46 countries, and has been conducted each year since 2007 by a group of professors from 11 renowned universities across Europe. The results of the 2011 survey will be released in July 2011.

The 2010 survey identifies two main issues of major importance for communication professionals throughout Europe. Half of the respondents stated that coping with the digital revolution and the social web and/or linking business strategy and

communications are the most relevant issues for them in the near future. See chart below.

The survey shows that PR professionals expect heavy growth in the importance of social media. It concludes that online communities (social networks) are the most important social media platform.

Today's workforce is basically shaped by the ever-changing technological innovations

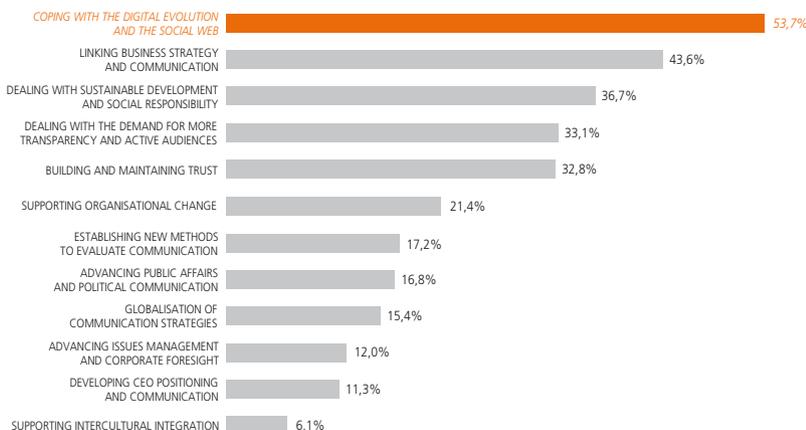
Almost every second European professional (45 percent) thinks online communities are an important channel for public relations

today, whereas only 26 percent believe in Twitter and 17 percent in Wikis. Predictions for the future are very positive for any type of social media platform, with online videos leading the path. The survey also reveals that the use of social media is mainly considered to be an opportunity, though openness and loss of control are possible threats.

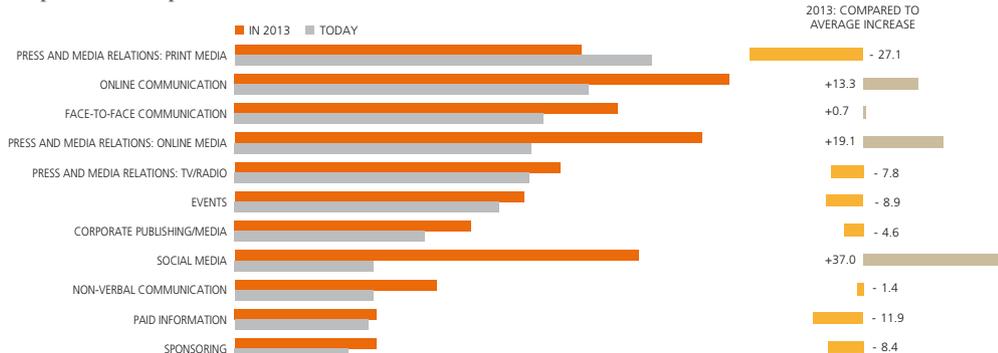
In spite of this outlook, only a minority of organisations has already started to establish important prerequisites for this field, such as social media guidelines.

Less than one third of organisations have already implemented necessary prerequisites for social media communication like social media guidelines, monitoring routines or even key performance indicators. Those

The most important issues for communication professionals up to 2013 in detail



Expected development of communication channels



companies which are at the cutting-edge when it comes to implementing specific concepts for social media are mainly joint stock companies.

Source: Zerfass, A., Tench, R., Verhoeven, P., Verčič, D., & Moreno, A. (2010): *European Communication Monitor 2010. Status Quo and Challenges for Public Relations in Europe. Results of an Empirical Survey in 46 Countries (Chart Version)*. Brussels: EACD, EUPRERA (available at: www.communicationmonitor.eu)

Fleishmann-Hillard European Parliament Digital Trends Survey

Fleishmann-Hillard has conducted a qualitative research and asked MEPs to respond to eight multiple choice questions. 120 of them responded to this online survey.

Personal contact and media coverage are viewed by MEPs as by far the most effective communications tools although there is a market attitude shift towards social media.

Social media have to be handled with care!

Extracts of some key findings are summarised below.

While MEPs continue to make use of a wide range of channels to communicate, the most notable developments since 2009 have been the doubling of social network uptake (mainly Facebook), the rising popularity of Twitter, and the decline in blogging, probably due to its time intensive nature and the fact that Facebook and Twitter provide an immediately accessible audience.

How frequently do you use the following online tools/resources for research or other daily legislative work?

| | |
|---|-----|
| Search engines | 99% |
| Online versions of traditional newspapers | 99% |
| EU focused online media | 97% |
| Blogs | 75% |
| Wikipedia | 91% |
| Websites of interest groups | 95% |

All MEPs use internet extensively to research their daily legislative work. Media remains key with both traditional and EU-focused news being regularly followed, indicating an interesting overlap between

traditional media and digital: digital tools are increasingly used as the gateway to the traditional media.

How useful can the following methods of stakeholder communication be in informing your thinking on policy issues?

| | |
|------------------------------|-----|
| Blog | 80% |
| Twitter feed | 47% |
| Organisation website..... | 95% |
| Specific issue website | 96% |
| Events | 73% |
| Position Papers | 91% |
| Personal contact..... | 99% |

Interest group websites are also valuable sources of information, in particular when they provide summaries of issues, although MEPs still appreciate in-depth reports. Specific issue websites are valued more than generic organisation websites, microsites for example are a highly viable means of communicating with MEPs.

For more information and full survey results: www.epdigitaltrends.eu
Contact Anita Kelly at +32 498 11 21 48
anita.kelly@fleishmaneuropa.com

Pros and Cons: The challenge of balancing the benefits of social media in the workplace with the risks

Companies have to evaluate if and how employees can use social networks at work. Businesses are increasingly using social networks in order to make sure that employees keep pace with developments in their industries, and that they interact with online communities, which are helpful tools to promote companies or organizations. Nevertheless, they have to be used without harming security by spreading sensitive information or lowering employee performances and productivity.

A Research by McKinsey Global Institute survey (December 2010) revealed that a new type of company emerging is "the networked enterprise". Those Companies using web 2.0 most intensively gain greater market share and higher margins.

Social media has just shifted the way business is done and it's very likely to continue, the future of work is a challenging topic which is going to continue to evolve

at a very fast pace! As a result, company procedures must now address the issue of irresponsibility rather than the usage of social media tools.

Some useful advice for companies who are confronted with online activities:

- **restrict access:**
Instead of prohibiting internet usage the best strategy is to find ways to monitor and regulate employee's online activities.
- **Educate and train staff:**
Educate users in the risks and responsibilities of online reputation management; inform employees that corporate rules apply online as well.
- **Set security and usage policies:**
Explain what information may be shared online and what may not be disclosed. Implement two types of guidelines: a general policy defining appropriate electronic communication and another policy defining the use of social networking sites at work.

Sources:
<http://www.scribd.com/doc/48622102/Social-Media-in-the-Workplace>
Fleishmann-Hillard: <http://www.fleishman-hillard.eu/>
<http://www.communicationmonitor.eu/> -
<http://www.communication-director.eu/>
http://www.mckinseyquarterly.com/The_rise_of_the_networked_enterprise_Web_20_finds_its_payday_2716
Jill s.cox article - paper 360°

Start with a check : what's important for you online

- Your Position in Google and those of your competitors
- Check Wikipedia pages of your company, products or sector
- Check the statistics of your issues on Wikipedia pages at <http://stats.grok.se/>
- Check who is twitting about your company or products: www.backtype.com
- Find the top 5 best blogs & twitter feeds; www.twazzup.com

Source: steffen.thejllmoller@fleishman.com



National Associations Activities



UK/ CPI

Corrugated Packaging Industry Joins Pro-manufacturing Initiative

In 2011, the corrugated packaging industry, represented by the Confederation of Paper Industries (CPI), will be taking part in a concerted programme to influence government policy on the future of UK manufacturing.

This programme, known as the Dods UK Manufacturing Dialogue, is bringing together the political and business communities to discuss what the government should be doing to help the UK manufacturing sector grow.

In addition to advantages arising from potential growth in manufacturing, this initiative is a major opportunity to raise awareness of corrugated packaging to MPs.

CPI will be partnered in this venture by the Food & Drink Federation, General Motors, Astra Zeneca, GlaxoSmithkline, Barclays, Boeing, Finmeccanica and the Institution of Mechanical Engineers (IMECHE).

This very high profile national programme integrates various activities such as:

- Written research among MPs in order to clarify opinions and obtain information on issues related to manufacturing (specifically the recent decline and how to address this in future).
- Research is also being undertaken among industry professionals, including interviews on camera with sponsors^(*).
- Focus Groups are also being conducted to identify public opinion (three events across the country for geographic spread).
- Roundtable Parliamentary discussions are taking place throughout the year

(in Westminster and the Welsh Assembly). A successful first roundtable took place on 1 March entitled: "Perception of Manufacturing" at which 12 MPs were present.

In the autumn, additional meetings, specifically focused on UK manufacturing will be held during major political Party Conferences. Analysis and findings from the programme will be produced in a final report to be presented at a Parliamentary Reception.

Andrew Barnetson, Corrugated Sector Manager of CPI, said: "Involvement in this initiative enables the corrugated packaging industry to have a significant input into future policy on UK manufacturing. Over the past few years we have established a regular dialogue with key political figures, showing them how the corrugated packaging industry acts as a barometer of the pressures on UK manufacturing as a whole. Now we are taking the next logical step that will see us fully engaged in helping to promote the policies that will secure the long term future of UK manufacturing."

For further information please contact Andrew Barnetson, Corrugated Sector Manager, on +44 (0) 1793 889602 or email: abarnetson@paper.org.uk.

^(*) CPI interview is available at: www.epolitix.com/members/member-page/sites/manufacturing-dialogue/

Cardboard Book

Cardboard! It's low cost, readily available, familiar, portable, and recyclable, but something that's better than all of those qualities put together is the ease with which it can be used. No special tools or skills are required to cut, bend, fold, stack, glue, or tape it. All you need is a keen sense of imagination.

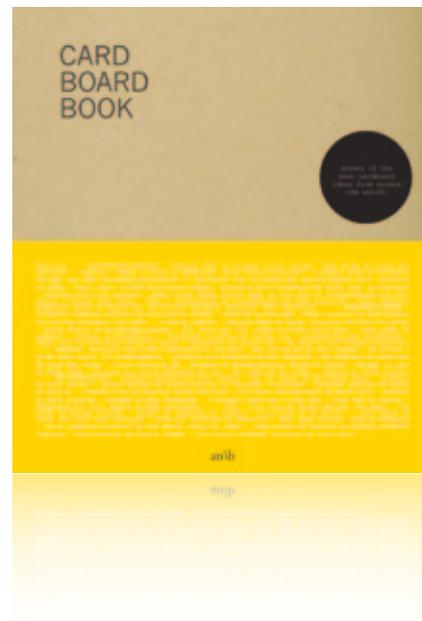
This amazing new book is packed with examples of the ingenious ways architects, designers, artists, and craftspeople have put cardboard to the test and successfully

harnessed its amazing qualities of strength and sound absorption.

Chapters include Architecture, Interiors, Furniture, Products, Art / Installations, Crafts / Toys and there is an index of designers and artists.

In the same series: Package and P.O.P. Structures, the Art of Package Design, Hello, Mr. Package!

<http://www.gingkopress.com/03-gra/cardboard-book.html>



Strategic Alliance

Global ICCA Forecast

ICCA releases global corrugated Forecasts 2010-2014



The Global Corrugated Forecast 2010-2014 addresses economic and business prospects, key factors influencing corrugated demand,

and forecasts of corrugated production by country for six regions around the world: North America, Europe, the Pacific Rim, Asia, Central and South America, and Other Regions (including Australia, Africa, the Middle East and Central Asia).

The 80-page complete global forecast and its accompanying 80-page Statistical Appendix was researched and compiled by PRISM. In addition, a third-party consultant reviewed the data and forecasts for accuracy, consistency and methodology. The complete report is available to ICCA and its member associations and companies.

For non-ICCA individuals, copies of the executive summary and one forecast region can be purchased from ICCA for \$2000 USD or the complete report can be purchased for \$5000 USD.

Contact Sharlene Huske at shuske@fibrex.org or 847-364-9600 for purchasing information. www.iccanet.org.

CEPI Preliminary Statistics 2010

European Pulp and Paper Industry Preliminary Statistics 2010 are available on the CEPI Website.

Paper and board output by CEPI member countries in 2010 rises by around 8%. The paper industry did slightly better than the European manufacturing industry taken as a whole.

For more information, please contact Eric Kilby at e.kilby@cepi.org. www.cepi.org/publications



FEFCO Activities

FEFCO announcement



Ben Blydenstein has started in his position as Marketing and Environment Director at FEFCO on 2 April 2011.

Ben has held a number of roles at SCA Packaging since joining the company eight years ago. Prior to that, he held brand and marketing management roles at companies including SmithKline Beecham and Pernod Ricard.

"This is an important new role designed to meet an increasing need to promote the commercial and environmental benefits of corrugated packaging to a wide range of stakeholders including retailers and European Institutions," says Roberto Villaquiran, Chair of the Marketing & Environmental Committee. "I welcome Ben and wish him every success in meeting the challenges that lie ahead."



Save Food Project

FEFCO will participate as a sponsor of the Save Food Special Show at the forthcoming Interpack Fair 2011 in Dusseldorf.

The initiative, a co-operation between the United Nations Food and Agricultural Organisation, Messe Düsseldorf and packaging associations, will explore how individual elements such as packaging, logistics and transportation can contribute to the reduction of global food losses. It consists of a two day high level Congress on the 16th and 17th of May and an exhibition for the duration of the Interpack Fair. "Food waste is a serious problem globally," says

Ben Blydenstein, Marketing and Environment Director at FEFCO "Levels are estimated at around 30% in Europe and are similarly high in developing countries. Corrugated packaging has an important role to play because it is a cost and space efficient means of storage and protection during transport and can be customised to fit any size or shape of product. FEFCO is proud to support the Save Food Special Show."

The stand will be in the glass pavilion on the open air area of the Interpack fairground. Interpack runs from the 12th to the 18th May 2011.

For more information visit www.save-food.org/ or email to ben.blydenstein@fefco.org

CITPA

Breakfast – follow-up meeting at the European parliament. Presentation of the Industry Guidelines for the compliance of paper and board materials

Date: 3 May 2011 from 8:30 to 9:30 at the European Parliament - rue Wiertz 60, 1047 Brussels

Ms Pilar Ayuso, Member of the Environment, Public Health and Food Safety Committee at the EU Parliament will host the event. Her welcome speech will be followed by an introduction from John Swift, (Chairman of the Industry Guideline Draft Committee). CITPA President Bengt Nordin will present the conclusions. This meeting is a joint initiative of CITPA and CEPI.



New FEFCO Sympathiser Members

We are glad to welcome the following companies who recently joined FEFCO:

| | | |
|---------------------------------|--|--------------|
| Ammeraal Beltech B.V. | www.ammeraalbeltech.com | Netherlands |
| Arden Software Limited | www.ardensoftware.com | UK |
| CELMACCH SRL data | www.celmacchgroup.com | Italy |
| CellMark AB | www.cellmark.com | Sweden |
| EDF Europe SRL | www.edfeurope.com | Italy |
| Feltri Marone Spa | www.feltrimarone.it | Italy |
| Flexoclean Engineering B.V. | www.flexoclean.nl | Netherlands |
| Lamina System AB | www.laminasystem.com | Sweden |
| Payne | www.payne-worldwide.com | UK |
| Pierre Lelong Services | | France |
| Sappi Paper and Paper Packaging | www.sappi.com | South Africa |
| SITlog GmbH | www.sitlog.com | Germany |
| Stratis Plastic Pallets | www.pallets.com | USA |
| Tresu A/S | www.tresu.com | Denmark |

Events

Save Food – FEFCO Stand

Come and visit us at the glass pavilion - open air area Interpack, 12 – 18 May, Messe Düsseldorf

FEFCO Summit 2012

18-20 April 2012

Marriott Hotel

Vienna, Austria

www.fefco.org

Industry Events

ICCA Congress

The 2011 ICCAWCO Global Summit

May 22-25, 2011, Montreal, Quebec, Canada,

Fairmont, The Queen Elizabeth Hotel

www.iccanet.org



European Paper Week

15-17 November 2011

Crown Plaza - Brussels

www.cepi.org

Other Events

Interpack

12 – 18 May, Messe Düsseldorf

www.interpack.com

PLMA World of Private Label 2011

24-25 May, RAI Centre, Amsterdam.

www.plmainternational.com

Rosupak,

14 – 18 June, Crocus Expo

International Exhibition Center,

Moscow, Russia

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