

# Afera's 52<sup>nd</sup> Annual Conference in Cracow, Poland

Presented by the 'Eastern Europe' Region of Afera's Membership represented by **Renata Klamka**, this year's Conference took place in the historical Polish city of Cracow, bringing together the self adhesive tape industry's creative minds and decision-makers for an annual industry meeting.

## Overview

Hosted at the Sheraton Krakow Hotel from **6-9 October**, 2009's Conference had a strong showing of attendees: **104 delegates and 20 partners from 13 European countries and regions plus the U.S., Canada, Turkey and U.A.E.** The Annual Conference's 4-day working programme focussed on the collaboration of Afera's Members and three Committees, and included **8 lectures** covering the latest trends in the tape industry. Together with an inspiring social programme, warm autumn weather, 5-star accommodation and the backdrop of medieval Cracow, the 52<sup>nd</sup> Annual Conference, in spite of the current economic climate, was once again deemed a success.

## Feedback

'**Hotel facilities and service**' and '**adequate time for networking**' were the points which received the highest scores in the participant survey conducted at the conclusion of the Conference. Feedback was very positive across the board, including a resounding '**YES**' to the question, '**Did this Conference meet your expectations?**'

Although all of the presentations received consistently favourable marks this year, **the highest-rated paper** was "**Increasing the Pie for the European Self Adhesive Tape Industry: An Insight into the Opportunities to Replace Alternative Joining Methods**" by **Isabelle Meijer and Frank Voermans of Meijer + Voermans Consulting (CH)**, closely followed by "**Professional Intuition: Your Key to Success**" by **Antoinette van Alphen of MTC Outdoor Europe (NL)**, and "**Pressure Sensitive Tape Production in Western Europe 2008**" by **Wolfgang Roessing of ExxonMobil Chemical (D)**. *See reviews of these presentations below.*

Everyone agreed that the setting, the **Sheraton Krakow Hotel**, **provided the best, most modern accommodation** in the vicinity, located right on the left bank of the Vistula River and down the road from the Wawel Castle outcropping. Following Wednesday evening's traditional welcome cocktails, Thursday's **partner tour programme** included a half-day excursion to Wieliczka Salt Mine, the oldest of its kind in Europe and on UNESCO's List of World Heritage Cultural Sites. In the afternoon, partners and delegates were jointly led on a three-hour walking tour of Cracow's Historic Centre. The historical capital of Poland has one of the best-preserved medieval centres in Europe and is also listed as one of the thirteen cultural sites in Poland on UNESCO's World Heritage List. Dinner was enjoyed in a traditional folk atmosphere at Folwark Zalesie and included a show.

Friday's partner tour programme included a cruise up the Vistula River to Tyniec, sight of the famous Benedictine Abbey. After touring the abbey, participants partook in a tasting of homemade liquors of herbs and honey. After returning to Cracow, partners visited the Jewish District Kazimierz with its unique monuments, followed by lunch. Friday's closing dinner was a casual affair hosted at the Tetmajerowska Restaurant on Cracow's main square, where diners were entertained by a jazz pianist.

## Thursday's Programme

### **Opening of the Annual Conference**

**Outgoing President Joaquim Puig** opened 2009's Annual Conference by addressing the global economic crisis which began to grip the industry mid-2008. He said that green shoots are beginning to sprout, meaning that he has a positive outlook on the economy. How soon will business start to see a positive turnaround? In the short run? Long run? That is difficult to say. A man's conduct reflects

his character. French President Nicolas Sarkozy has changed the way GDP is calculated by adding different elements to the equation, teaching us that in business we must assume a more positive view and be creative, changing our focus and approach to meet new challenges. Afera's Conference agenda facilitates this refocusing. Mr. Puig concluded his opening address by appealing to his tape colleagues on a personal level: Do your best to make the most of the future, for the rest of your life. He then passed the baton to **incoming President Filippo Antonelli of 3M**.

## **Climate Change**

**Mr. Marcin Saramak of Stomil Sanok S.A. (PL)**, a major technical rubber manufacturer in Poland, delivered the first lecture, reviewing **the state of the Eastern European economy as affected by climate change**. His presentation referred literally to climate change as a pretext for discussion of economic phenomena of the past two years. According to Mr. Saramak, the economy and climate more recently have had something in common: predictable unpredictability, as both market and climate change deviate from the paradigms and algorithms that have applied till now. The ten years that it took to decide finally that global warming is really happening have their equivalent in decades of the dominant belief that the market was rational and efficient.

The lecturer cites numerous examples of failed attempts to reach a universal agreement on ways to achieve moderately ambitious emissions goals. The G8 commitment to reduce carbon emissions by at least 80% by 2050 was mentioned as one such attempt. The agreement did not specify any short or medium-term goals for cutting emissions, a very unfortunate shortcoming over which the world leaders could have taken more control.

Fundamental data gathered through scientific research on climate change confirms that the current warming of the Earth's climate is very likely due to human activities. According to Mr. Saramak, the transfer of effects of global warming has been paralleled by a collapse of Eastern European markets followed by a deep recession over the last two years in the countries of the 'Old Union'. Other corresponding trends were presented, opening a discussion of the current economic situation of the CEE Countries. A 'crisis of trust' was discussed.

Economic indices for Bulgaria, the Baltic States, Hungary, Romania, the Czech Republic and the Slovak Republic were briefly reviewed in an effort to indicate crucial aspects of the current economic situation. The smallest countries, the Baltics, have suffered the most. The lecturer referred to Hungary and the Czech Republic as 'the smart alecks' and Romania and Poland as 'more complicated' cases. Polish figures in particular were presented to be interpreted by the audience. Mr. Saramak said he didn't think the crisis would last long in Poland.

Mr. Saramak reviewed a report by *The Economist* Intelligence Unit including the opinions of 300 senior executives from companies trading with or investing in the region or planning to do so. The report shows that the CEE growth of recent years cannot continue at the same pace in the face of the global downturn. In this respect, the lecturer says he does not have the optimism which Mr. Puig expressed in his introduction. The region as a whole may have avoided economic meltdown, but several countries face a painful slump.

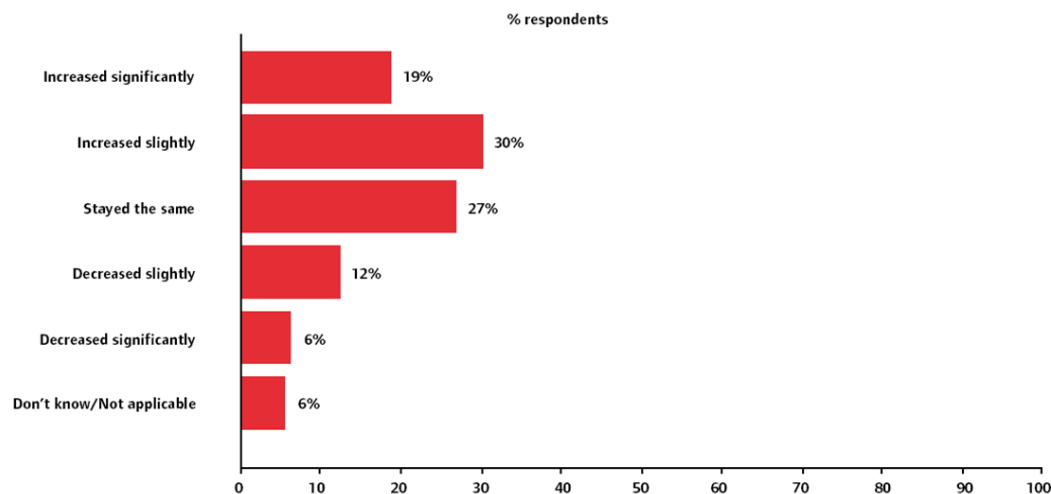
Mr. Saramak observes that in spite of concerns about the regional economy, companies do not expect a significant deterioration of their business in Central and Eastern Europe in the next three years. The speaker remarked on his own experience with the basic strategies implemented in the area of purchasing and investment during the period of the downturn. These include careful actions taken regarding the stability of the supply base (radical change in sourcing), strict investment rules, waste discharge and operational initiatives to retain expertise within the company.

Poland is the largest market, has benefited as an EU Member and exhibits strong performance as an emerging market in CEE. Why haven't the CEE EU Members adopted the euro? They haven't yet

been able to meet the conditions. Have risk levels changed for companies investing in CEE over the last three years? They are only slightly higher.

## Risk perception

How do you think the levels of risk in CEE have changed for your company over the past three years?



Source: Economist Intelligence Unit

## New Afera Market Study – Increasing the Pie for the Tape Industry

Following a short introduction given by outgoing **Afera Marketing Chairman Eric Pass**, **“Increasing the Pie for the European Self Adhesive Tape Industry: An Insight into the Opportunities to Replace Alternative Joining Methods”** was second on the Working Programme agenda, the most popular lecture of the Conference, delivered by Isabelle **Meijer** and Frank **Voermans** of **Meijer + Voermans Consulting (CH)**. Formerly employed by Alveo Seksui, the team presented the results of a specialty-segment tape market study which they performed in 2009 at the request of the Marketing Committee. The result is a 2-part study of the opportunities to increase the pie for the European self-adhesive tape industry by replacing alternative joining methods with tape.

Knowledge about the performance of current joining methods and their comparison with self-adhesive tape is a first step in successful modification of these joining methods with use of tape. First Meijer + Voermans developed a ‘methodology tool’, a digital programme that allows direct comparison of all joining methods on 25 criteria. The comparison tool includes data of 19 joining methods judged on joint features and production-related aspects.

The digital tool allows comparison in two directions: (1) Comparison of joining methods, showing the performance of selected joining methods on 25 criteria, and (2) Comparison of the performance on specific criteria, showing the top 5 joining methods performing the best on selected criteria. The results of the comparison are visualised in graphs, and the major strengths and weaknesses for the comparison of the specific joining methods are summarised.

The second part of the study takes the form of detailed market research concerning joining methods in consumer electronics, indentifying: (1) Main joining methods currently used, (2) Reasons for the choice of joining methods, and (3) Unmet needs related to current joining methods. The consumer electronics market is defined as any device containing an electronic circuit board that is intended for everyday use by individuals. The data is based on primary research (questionnaire) with experts in the

consumer electronics industry, chiefly design engineers and mechanical engineers. Mechanical joining methods are the dominant joining method for consumer electronics, mainly fasteners (screws) and integral joints (snap fit).

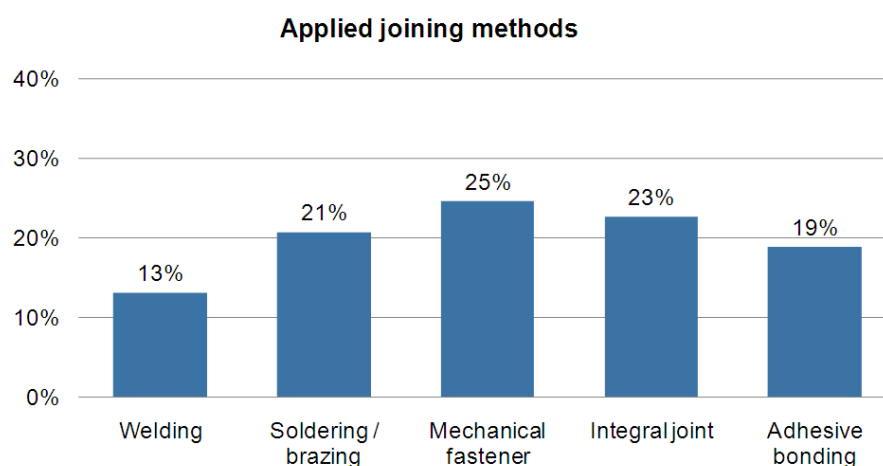
The result: Today the general awareness for PSA tapes as joining methods in consumer electronics is relatively low at 63%. Only 30% of those who are familiar with PSA tapes currently use PSA tapes for joining methods. Cost is not the number one factor in determination of use. There is a clear need to raise the level of awareness of self-adhesive tape for use as a joining method in order to increase the demand for use of tape in the consumer electronics market.

After Ms. Meijer and Mr. Voermans' presentation, Mr. Pass returned to the podium and expressed his satisfaction with the end result of the study, which clearly shows that there is opportunity for the tape market to increase the size of its pie. He emphasised that the tool can be used internally to train personnel or with customers to identify the optimal solution to their problem. In a significant way, the Meijer + Voermans methodology tool helps to position our technology in comparison with other technologies.

Mr. Pass concluded by announcing that the study was available for purchase at the Afera hospitality desk in the lobby. A 100-page hardcopy of the report and a write-protected USB stick containing the methodology tool is €300. He also said that an email regarding the launching and availability of the study would go out to all Afera Members not present at the Conference. Lastly, the MKC attached a multiple-choice paper survey to Meijer + Voermans' presentation at the Conference to gauge if Afera is on-target with this initiative.

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## 4. Joining methods in consumer electronics



All joining methods are used in consumer electronics

### **REACH**

After a midmorning break, the third lecture of the day, a detailed update on **REACH**, was delivered by **Paul Verspoor of SITMÆ Consultancy (NL)**. Mr. Verspoor detailed the continuing activity from the EC-level down to the company-level to facilitate compliance with REACH. This includes the Combined REACH Working Group, REACH Roadmap Parts I and II, Factsheets, etc. Although much progress has been made, REACH is still 'under construction' and must be watched carefully, warns Mr. Verspoor. For extensive coverage of this subject, see "Activities of the Committees > Technical

Committee > Inter-Industry REACH Project” on page 12 and “REACH Report November 2009” by Mr. Verspoor on page 19.

## **Supply Chain & Inventory Optimisation in Process Industries**

Next, to complete the business portion of the day, **Erik Thiry of A.T. Kearney GmbH (D)** presented an interesting paper on “**Supply Chain and Inventory Optimisation in Process Industries.**” The current global economic crisis has significantly impacted nearly all process industries, which include tape companies. The global economic crisis destroyed \$33 trillion of economic value, the deepest decline since the 1930s.

Mr. Thiry discussed A.T.’s Kearney’s expectations regarding future global business outlook and elaborate strategies for process industry players to deal with the impact of the global crisis. A lasting global recession, characterised by a ‘w’ trajectory, is the most probable scenario. A fast return to ‘normal business’ of the pre-crisis era is not very plausible.

As from 2011, slow recovery is projected in the years to come. Business needs to prepare for this. Mr. Thiry reviewed some bright spots on the horizon for medium-term economic turnaround: In terms of regulation, controlled reduction of ‘grey’ financial markets will take place. After significant price erosion, raw materials will only be subject to moderate price increases. Globalisation will affect growth and purchase power increases in developing countries (driving future growth). In terms of demographics, there will be increases in birth rates in industrialised countries as well as wealthy, retired old-agers. Finally, and most significant in the technology/innovation sphere, the ‘2<sup>nd</sup> Apollo Programme’ in the Sahara will create possibilities.

Actual chemical cycle outlooks are still pessimistic. Companies are focusing on short-term effective measures to react to the crisis. Supply chain and inventory management is considered to be one of the key levers to master the pivotal challenges of the ongoing crisis. Professional supply chain and inventory management can manage the crisis as efficiently and smoothly as possible and help minimise crisis symptoms.

A key enabler to improve supply chain performance is comprehensive management of the high level of complexity along the value chain that process industries/tape companies typically are facing. A.T. Kearney’s methodology can also help to manage complexity towards maximum business performance.

Supply chain management is relevant to find the integrated optimum among service levels, costs and inventories. Supply chain and logistics costs have significantly increased over the last five years. The supply chain ‘service gap’ still exists because self- and external evaluation differ significantly. Inventories have decreased over the last few years but are still at a high level. A structured best-practise approach helps to develop opportunities along the supply chain. The management improving the supply chain need to address all processes and the management basis in the value chain.

A holistic new supply chain model offered by A.T. Kearney covers all dimensions from segmentation and planning to network design. The key of a new supply chain model is new, market-driven segmentation. This segmentation drives production assets, logistics structures and process design as well. Inventory targets are defined based on segmentation. Right-sizing ensures the right balance between capital, service levels and cost.

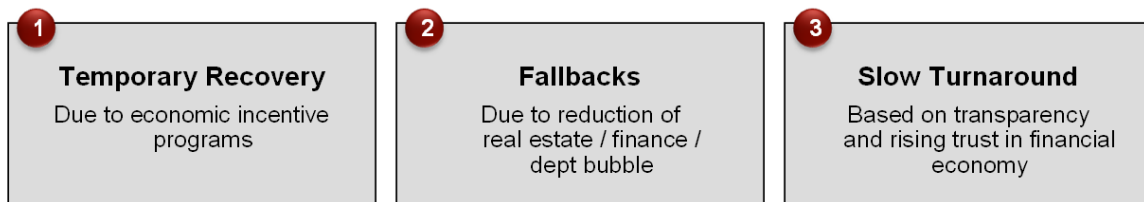
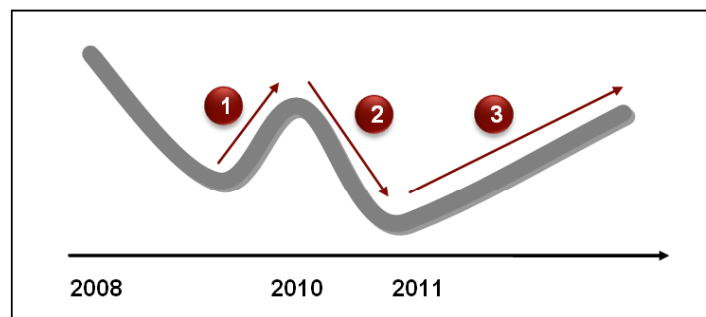
In managing complexity along the value chain, business-specific drivers for complexity need to be identified first. Typical complexity fields in chemicals: product/SKU portfolio, markets/segments, customer portfolio, formulations/raw materials, R&D, IT systems, organisation, processes and procedures, production network and technologies. A.T. Kearney’s methodology looks at cost and value impact of complexity across the value chain. Fact-based cost and value transparency are prerequisites to developing EBITDA improvement measures.

Lastly, Mr. Thiry drew attention to the 6th A.T. Kearney/ELA Supply Chain Study, saying that there are very few studies with a 25-year continuity such as this one. In 2008, companies from 18 European countries with a broad range of industries participated in their survey. In summary, supply-chain excellence amidst the global economic crisis will be characterised by further regionalisation of the supply chain and globalisation, a shift from push- to pull-production, networking capital reduction and risk management amidst the crisis, and consolidation and regionalisation of the supply chain network. More detailed information is available in the Supply Chain Excellence Report of the 6<sup>th</sup> A.T. Kearney/ELA Study at [www.logistics-excellence.com](http://www.logistics-excellence.com).

ATKEARNEY

## "W"-Trajectory is likely

### Global GDP trajectory



Source: A.T. Kearney

A.T. Kearney 16/07.2009/21156m 11

## Friday's Programme

### Interactive Session with Captains of Industry: Growth in a Crisis

The first item on Friday morning's agenda: **Eric Pass**, Afera's **outgoing Marketing Chairman and Director of Corporate Planning & Communications at Nitto Europe N.V. (B)**, moderated a 50-minute **'Interactive Session with Captains of Industry: Growth in a Crisis.'** This was a very successful, open, interactive debate among six 'captains' of the self adhesive tape industry and the other 100 attendees of the Conference. COIs included **Jef Smets of Avery Dennison**, **Hubertus von Voithenberg**, formerly of tesa and currently a consultant at ChemQuest and Afera TC Member, **Mike Punter of Parafix Tapes & Conversions Ltd.** and **Chairman of Afera's SDC Group**, **Lutz Jacob**, formerly of ExxonMobil and outgoing Afera TC Chairman and consultant, **Glen Anderson of the PSTC** and **Mike Ayres of Advance Tapes International Ltd.** and Afera SC Member. For a full review of the debate, refer to the article "Growth in a Crisis: COI Debate" on page 14.

### Engineered Adhesive Components Solutions

Next, **Mike Punter of Parafix Tape & Conversions Ltd. and Chairman of Afera's SDC Group** delivered a lecture on increasing the pie through **Engineered Adhesive Component Solutions**. Afera incorporated the Professional Specialty Die Cutters (SDC) as a European Converter Association within Afera's Membership framework, specifically as a Subgroup of the Marketing Committee, in 2008. The SDC Group's vision, goals and products, as well as a Member's point of view, is detailed in a feature article entitled "Afera's New SDC Group: Shaping Production & Innovation with Specialty Die Cuts" on page 13.

## **Pressure Sensitive Tape Production in Western Europe 2008**

Following a break, "**Pressure Sensitive Tape Production in Western Europe 2008**" was the subject of **ExxonMobil Chemical Europe's Wolfgang Roessing's** widely anticipated lecture. The subject of his presentation was the production of high-volume segments of packing and masking tapes in Western Europe excluding the regions of former Eastern Europe, Middle East and Africa. He also provided basic data for other tapes including double-sided, electrical, strapping and sanitary tapes as well as cloth, duct and other specialty tapes. Due to changed geographical coverage, the data of Mr. Roessing's presentation should not be compared with data from ExxonMobil papers formerly presented at Afera Annual Conferences.

In terms of total tape production in Western Europe in 2008: While Western European GDP was still growing by 0.7% , the PSA tape production rate declined by almost 7%, or about 400 million square metres (mm<sup>2</sup>), down to slightly less than 6 billion square metres (bm<sup>2</sup>). This is about the same volume produced in 2004, meaning the 2008 reduction more or less offsets the production growth of the years 2005 to 2007.

Until the third quarter of 2008, production was in line with expectation of a forecast GDP growth of about 2%. The financial crash at the end of the third quarter dramatically changed the trend. Inventory depletion became the key challenge for the whole supply chain resulting in a drop of tape production between 20% and 40% for the rest of the year. Termination of production of two Italian producers additionally contributed to the final decline of 7% for 2008 compared to 2007.

In terms of production by country groupings: Italian output dropped by 8% to 3.8 bm<sup>2</sup>. The aforementioned production halt of two producers in Italy impacted the overall result and contributed to the volume decline of almost 300 mm<sup>2</sup>. The Italian share decreased by another 1% to 65% of total Western European production. In 2004, Italy still counted for 68%. Germany/Austria/Switzerland declined by 6% and the grouping of other Western European countries declined by 3%.

In terms of production by tape applications: The production volume of packaging tape declined by slightly more than 7% to 4.1 bm<sup>2</sup>. Masking tape with -4% (0.7 bm<sup>2</sup>) and other tapes with -5% (1.1 bm<sup>2</sup>), were also severely hit by the recessional affect on the automotive and construction industries in the fourth quarter of 2008.

In terms of production technology: The snapshot for 2008 shows solvent technology down 8% to 2.7 bm<sup>2</sup>, followed by hot melt, down 6% to 1.9 bm<sup>2</sup> and water-based technology, down by only 4% to 1.3 bm<sup>2</sup>. The solvent decline was mainly driven by lower capacity usage and the closure of the two coating lines in Italy. Hot melt was negatively impacted by limited availability of SIS rubber and premium tackifiers. Positive impacts from other hot melt technologies not using synthetic rubber as base polymer contributed to a production decrease of 'only' 6%, slightly less the decline of solvent (8%).

In terms of technology positions: The technology comparison for 2008 versus 2004 definitely reflects the raw material challenges of the last five years. Hot melt technology lost about 4% and both solvent- and water-based coating both 2%.

In terms of packaging tape and technology positions: Packaging tape with 4.1 bm<sup>2</sup> represents about 70% of total Western European tape production. The portion of hot melt tapes declined by 5% to 28%, while the share of solvent tapes increased by 1% to 44%.

In terms of packaging tape by substrate: Which substrates have been used to produce the 4.1 bm<sup>2</sup> of packaging tape in 2008? Output of PVC tapes dropped by 11%, equivalent to about 70 mm<sup>2</sup>, down to 0.6 bm<sup>2</sup>, while production of BOPP tapes declined by only 6% to 3.4 bm<sup>2</sup>.

In terms of masking tape by technology: Masking tape, with slightly more than 0.7 bm<sup>2</sup>, is the second largest tape segment. Despite the serious influences of the automotive and construction industries, the fall in output, relative to the other adhesive tape segments, turned out to be moderate with 4% in 2008. The good growth of the first nine months of 2008 surely contributed to this. In addition, the de-stocking effect of finished products within the supply chain seems to have shown its full impact only at the end of 2008. Both technologies recorded the same downturn percentagewise, so that the ratio between solvent-, about 530 mm<sup>2</sup>, and hot melt coating, about 190 mm<sup>2</sup>, remained unchanged at approximately 75% to 25%.

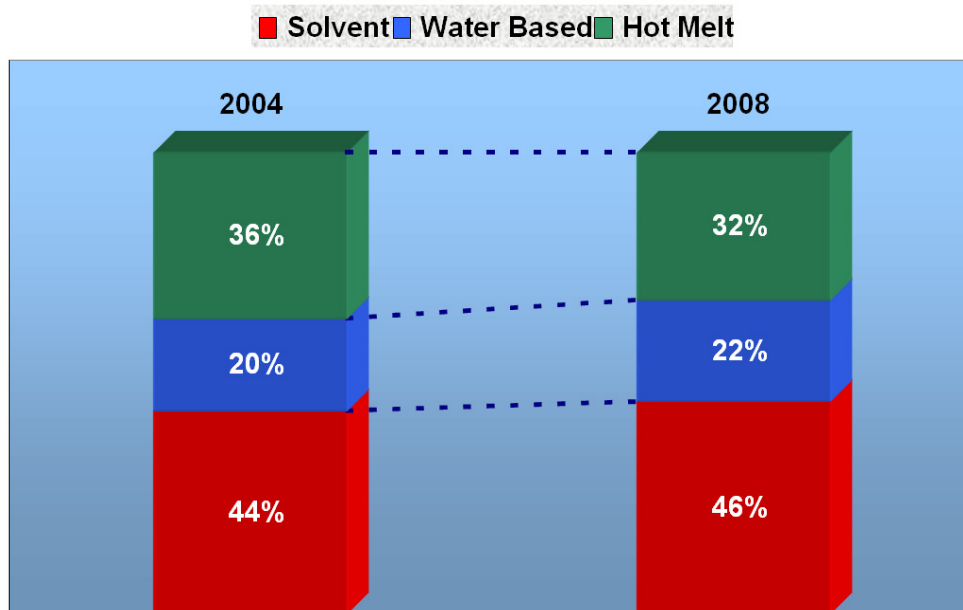
Mr. Roessing summarised the major factors which influenced tape production in Western Europe in 2008: The most severe economic crisis since the 1930s set in during the third quarter of 2008, leading to a sudden drop in demand for industry goods.

The destocking effect which followed the entire tape supply chain consequently caused an abnormal production decline between 20% and 40% in the fourth quarter, resulting in significantly lower production for 2008 compared to 2007. Packaging tape production was additionally impacted by two Italian producers ceasing manufacturing in 2008. Increased tendency to relocate manufacturing outside the region and/or to change supply chains by, for example, focusing own production on grades of core competence and to resell non-strategic products. As a result of the peculiar combination of these factors, Western Europe tape production declined by 7% in 2008, a year which hopefully will live in our memories as an exception.

Mr. Roessing, a long-time Afera presenter, closed his presentation by saying that he looked forward to presenting better industry figures at Afera's next Conference.



## Technology Positions



Hot Melt suffered from feedstock constraints

### Using Professional Intuition

**“Professional Intuition: Your Key to Success”** was the last session hosted by **Antoinette van Alphen of MTC Outdoor Europe (NL)**. Ms. Van Alphen used a refreshing, interactive, informal approach to introduce the audience to her challenge and passion: Learning to let your intuition function for you and your company on a professional level. Everyone especially enjoyed the Latin music with which she opened and closed her presentation to lighten the atmosphere. Ms. Van Alphen’s presentation was structured around a few interactive experiences, visual aids, and explanation and discussion of the recognition and use of intuition, its various applications, techniques and tools, and Q&As.

Especially in this time of uncertainty, professional intuition is an indispensable skill. It can give you, your colleagues and your business a real impulse to move in the right direction. Developing your intuition requires courage, motivation and inspiration. The tool will provide you with lots of new energy—it is fast, ‘out of the box’, innovative, personal and fun!

Three questions: Do you use Intuition in a business environment? Do you know how intuition works? Do you wish to develop intuition and improve both your business and your personal wellbeing?

These are the ways/feelings in which someone can recognize intuition: energy perceived; drained after a meeting; *fingerspitzengefühl*; stone in your stomach or a lump in your throat; knife in your heart; strong negative perception of a person or subject; broken heart; chills all through your body; hair on the back of your neck standing up; smells/stinks badly; a voice heard inside; suddenly energised; burden lifted; and strong sense of knowing.

To develop your intuition, you need an observer position with a helicopter view 24/7, expanding your consciousness. To follow your intuition, keep an open mind, be aware and ‘present’, do not judge, do not fall to emotion, and avoid having a special interest in a certain outcome. Relax, try not to hurry, and avoid stress, as it will block all insight. Use your rational mind to check the result, and respect the outcome.

How can I put my intuition to good use? When hiring personnel, communicating, decision-making, problem-solving, innovating, and most importantly, succeeding—knowing what you really want. In your daily business, create an environment which encourages the use of intuition. You can convince people of its use and worth by reading the signals, naming and sharing them; expressing intuitive perceptions clearly; and trusting your intuition. Others will feel—intuitively—that you are right!

Intuition provides you with a sense of overview so intuitive decisions naturally take into account your wellbeing, as well as that of others and of your whole environment. It is a very good tool for harmonising personal and company goals. The intuitive way opens up futures and infinite possibilities to choose from. Intuition feels like knowing you are doing the right thing. You get to know yourself better.

Intuition is a form of global communication. It is international and intercultural and knows no boundaries. Another great point about professional intuition is that it reaches beyond cultural differences that may exist between persons of different nationalities, backgrounds or religions.

Intuition can be your key to success, motivating you to become more conscious of your personal professional intuition. It creates insight, accurate business decisions, better self-knowledge, communication, an open mind, more choice, innovation, and life change. And it is free. Ms. Van Alphen suggests that the key to success is that you are able to express your unique and authentic qualities the best you can.

Ms. Van Alphen concluded with quite a few Q&As, finally encouraging her audience to develop a language in business that honours the importance of using intuition to succeed.

## **Closing of the Annual Conference**

**Incoming President Filippo Antonelli** closed 2009's Annual Conference first by recognising **three outstanding achievers among Afera's outgoing leadership: long-time SC Members Joaquim Puig (outgoing Afera President), Lutz Jacob (outgoing TC Chairman) and Eric Pass (outgoing MKC Chairman)**, who retired from their positions as of the General Assembly the day before. Requesting that they approach the podium, Mr. Antonelli thanked the three for their years of exceptional service to Afera. They were presented with gifts and received a warm applause from the audience.

Mr. Antonelli concluded by listing two of Afera's main objectives: First, improving European representation of the tape industry, an aim which can be supported by every Member by recruiting new Members. Second, focusing on expansion of Afera's role globally. Afera has made significant progress in both areas, but in light of the present economic circumstances, all efforts must be redoubled. Members must remain active in Afera. From what he had seen at the Conference, in terms of lecture quality and content, and networking opportunities, this Afera event was indeed a success. Finally, Mr. Antonelli did share his view that the economic crisis was subsiding, however slowly, citing the positive signs that had been discussed during the COI Debate.

## **Sponsors**

Afera's 52<sup>nd</sup> Annual Conference once again provided a platform from which Members could conduct business-to-business marketing by sponsoring the event. Afera had the privilege of organising the event with the support of the following sponsors: **Gold: Dow; Silver: NAR SpA; Bronze: Sekisui Alveo, Mondi Packaging Jülich AG, and Ahlstrom.**

## **Slides, Notes & Additional Info.**

The proceedings of the Conference programme were distributed to the participants, and the corresponding slide presentations can be found on [afera.com](http://afera.com) (Members-only section). A detailed 52<sup>nd</sup> Annual Conference programme, as well as this article, can also be found at [www.afera.com](http://www.afera.com).

### **Next Year's Annual Conference**

Hosted by Afera's 'Northern Europe' Region of Membership, **Afera's 53<sup>rd</sup> Annual Conference** is set to take place at the **Sheraton Stockholm Hotel in Stockholm, Sweden** from **6-9 October 2010**.