

Afera Marketing Committee (MKC) Meeting Minutes

Date: 3 February 2015

Time: 13.00 – 17.00

Venue: DoubleTree by Hilton
Hotel, Amsterdam, The
Netherlands

Present: Michael Punter (Afera MKC Chairman, Parafix Tapes & Conversions Ltd)
Henning Mohme (3M Deutschland GmbH)
Sharon Boyle (Advance Tapes International Ltd.)
Jean-Philippe Ponté (Ahlstrom)
Joanna Wolska-Kinneging (Avery Dennison)
Annegret Lange (Evonik Industries AG)
Klas Zetterman (ITW PSA & Components Group)
Suresh Subramanian (Organik Kimya SAN. Ve TIC. A.Ş.)
Carles Andreu (tesa Western Europe B.V.)
Matthias von Schwerdtner (tesa SE)
Ralph Uenver (Lohmann GmbH & Co. KG)
Mete Konuralp (Steering Committee Member, tesa Bant San. Ve Tic. A.Ş.)
Louise Vincent (Parafix Tapes & Conversions Ltd), guest
Bert van Loon (Independent Strategist), guest
Astrid Lejeune (Afera Secretary-General, Lejeune Association Management)
Bathsheba Fulton (Afera Editor)

Excused: Alberto Loro Lamia (The Dow Chemical Company)
Stefan Neuner (Neenah Gessner)
Stefan Meirsman (Nitto Europe N.V.)
Anurag Yadav (Scapa)
Fritz Stock (tesa SE)

Chairman: M. Punter
Secretary: A. Lejeune
Date of Next Meeting: Tuesday, 6 October 2015 (Time TBA) at the Intercontinental Marseille – Hotel Dieu in Marseille, France, directly preceding the Annual Conference.

Agenda

1. Opening/Agenda/Competition Law Compliance
2. Minutes and Actions of Meeting of 1 October 2014
3. Update on Creative Concept for "Ideas that Stick" Initiative
4. Afera Marketing Committee as Review Board
5. Afera Annual Conference 2015
6. Afera Media Tools
7. Other Matters (submitted prior to the Meeting)
8. Next Meeting, Closing.

Note:

- Refer to the **Afera MKC Presentation 3 February 2015** slideshow for information co-ordinating with these Minutes.
- **Bolded, highlighted** names denote expected actions.

1. Opening/Agenda/Competition Law Compliance

- 1.1 MKC Chairman Mike Punter opened the Meeting, introduced new MKC Member Suresh Subramanian, BU Director at Organik Kimya (Turkey), and guest Louise Vincent, Marketing Executive at Parafix (UK).
- 1.2 Afera's Competition Law Compliance Policy was reviewed, confirmed by all present.

2. Minutes and Actions of Meeting of 1 October 2014

- 2.1 Minutes were approved, signed as a true record of proceedings.
- 2.2 Converter input (update on any issues raised by converters): Not discussed.
- 2.3 Progress of MKC topic-driven WGs developed according to Afera's mission to 'grow the pie' for all companies in the European adhesive tape value chain:

Social Media Programme: See agenda item 3.

Website Management WG: Sharon Boyle updated the MKC on the WG's significant progress in restructuring afera.com (see slides 5-13), which is moving from the clean-up stage to the building and polishing stage.

- **All MKC Members** will give any input they may have on the site—specifically the *Why Tape?* section—to [Astrid Lejeune](#).
- **All MKC Members** will submit unbranded visual aids, i.e., images, photos, diagrams, etc., especially if they can take the place of text. **Bathsheba Fulton** will send an email to the MKC (in addition to **Stephanie Feith's** sending one to all Afera Members) containing a list of requirements. **Ms. Lejeune/Ms. Feith** will create a database of images for website use.
- **Web MGMT WG** will set goals and a timeline for actions at its 4 February meeting. **Ms. Fulton** will distribute Web MGMT WG decisions and action lists of future meetings. *See attached Afera Website Management WG Meeting Minutes 4 February 2015 doc.*

Membership Recruitment WG:

- **Web MGMT WG** will decide where “New Members” should be placed on the site. **Ms. Feith** will list new Members prominently on the website.
- Focusing on non-specialty, commodity tape manufacturers which make up 2/3 all manufacturers, **Ms. Lejeune** will speak with Lucio Trincia (NAR SpA, TC Member) directly and 2 other principle Italian players, to find out what we can offer them and conversely attract more Members. She will enlist SC Member **Filippo Antonelli** to support her in providing leads in this exercise, especially via Assogomma. They probably like the Freedonia study/marketing data presentations at the very least.
- **Ms. Lejeune** will speak with the European Carton Makers Association to find out if they know what packaging tape manufacturers are looking for in an association.
- Membership recruitment will focus on remainder of tape manufacturers in Europe, and converters because they create specifications and components using tape products. Afera will not actively pursue channel partners/-distributors but will consider them for membership if they apply.
 - **Ms. Lejeune** will create a database of potential members with the assistance of the MKC. She will distribute a list of current Members to the MKC so they can identify who is missing.
 - **Mete Konuralp** will take charge of notifying Ms. Lejeune of at least 10 European tape manufacturers to be approached.
 - **Mr. Punter** will take charge of notifying Ms. Lejeune of converters to be approached. He will ensure that he distinguishes between converters (adhesive component producers or die-cutters) and distributors. He will run his list by some MKC Members who are also familiar with this area.
 - **Ms. Lejeune** will ensure that a list of potential suppliers is supplied by the TC. **Mr. Konuralp** will also supply Ms. Lejeune with a list of suppliers he is aware of and review the comprehensive list with her.
- On behalf of the MKC, **Ms. Lejeune** will propose changing the official member category names (active > tape manufacturers; associated > suppliers) along with the fee structure.

Education Awareness WG: A TC Working Group consisting of Evert Smit (Arizona Chemical), Reinhard Storbeck (tesa), and Kelly Anderson (3M) will work with the MKC on getting tapes and raw materials of tapes into the curricula of European design engineering/product design higher educational programmes. The WG will meet with Mr. Punter and determine what actions need to be taken to achieve the objective, which will take a few years.

- The MKC’s role in this activity is to draw up a plan with the TC:
 - Understand the route into the university syllabus in each European country
 - Co-create the content
 - Support giving exposure to the content; it has to be a technical sell with some marketing support.
- **Suresh Subramanian** will join the new Edu. Prog. WG.

General Communications: Ongoing.

Annual Conference WG: See agenda item 5.

- 2.4 Feedback SC on question ‘value Afera membership for commodity producers’: See agenda item 2.3.

3. Update on Creative Concept for “Ideas that Stick” Initiative

- 3.1 Results and way forward on interviews with designers: See Bert van Loon’s attached slide show updating the MKC on the social media project.
- 3.2 Further content development via blogs, twitter approaches/followers:
 - **Mr. Van Loon** will provide the “Design that Sticks” Twitter handle <https://twitter.com/ProductDesign> to **Ms. Feith/Ms. Lejeune**, indicating the best time to send it out to all Afera Members so they can follow it. He will also add mention of Afera on the Twitter page.
- 3.3 Way forward and plans for Afera Marseille Conference in October:
 - On behalf of Afera, Parafix (with **Louis Vincent** acting as manager) will organise participation in The Big Bang Fair (UK young scientists and engineers event) from 11-14 March 2015. Parafix will pay for a co-branded stand with Afera. **Mr. Van Loon** will notify Big Bang organisers of Afera-Parafix participation.
 - **Mr. Punter** and **Mr. Van Loon** will try to find a presentation topic which is aligned with strategic positioning of Afera, and then have someone record it and publish that content on the website.
 - **Mr. Van Loon** will begin creating a valuable industry media and events list for the European adhesive tape market over the next 3 months. This will be pitched at the Annual Conference as a new Member benefit; its reception by current Members will be gauged.
 - The list will be created within a limited budget with the active support of the MKC and updated 4 times/year.
 - Creating the list will involve identifying the events, dates, contact details of the organisers, etc.
 - The cost of maintaining this list is estimated at €500/year.
 - Eventually barter agreements with event organisers can be pursued.
 - Mr. Van Loon requested that each MKC Member submit to him 1 leading industry event, 1 leading industry print publication, and 1 leading online hub. **Those MKC Members not in attendance** can email them to bert@bertvanloon.com.

4. Afera Marketing Committee as Review Board

- 4.1 Brainstorm on future ‘Captains of Industry’ debates: See agenda item 5.
- 4.2 Market trends and statistics presenting at Afera’s Annual Conference (evaluation 2014 and brainstorm 2015 and beyond): Not discussed.

5. Afera Annual Conference 2015

- 5.1 Review/consideration comments Dubrovnik Conference: Feedback was particularly positive. See MKC presentation slides 17-18 containing individual snippets of feedback.
 - **Ms. Lejeune** will ensure that participant evaluation forms for Marseille Conference contain section on Conference length and format.
- 5.2 Theme/topics Marseille Conference Programme: See attached video presentation.

The MKC is charged with designing and organising the next Conference Programme.

- Theme suggestion: “New frontiers” or “2025 frontiers” for the adhesive tape industry, including topics such as natural resources/energy sources (both in production and as markets), the future of SMEs and family-owned businesses, industry business models, marketing, Europe in global context, workforce 2025 (HR, recruiting engineers of the future from a shrinking base, academic awareness), key technological challenges, designer demands, industry ‘sputnik moments’.
- The following Conference topics were suggested:
 1. 2 debates – end user (view in), Captains of Industry (view inside out)
 - **All MKC Members** will nominate invitees for the Captains of Industry debate; choose within your companies who would be the best people to answer discussed questions/topics mentioned below
 - **Mr. Punter** will review the development of the Conference presentation topics with **Ms. Lejeune** first; then focus on determining COI invitees.
 - New faces needed
 - Less prepared; more real-time, spontaneous; questions may not be given in advance, only general subjects
 - Create a few different topics
 - Have a debate among a group of designers and manufacturers; 3 or 4 people from different areas (design industry, institutions, automotive industry, medical industry, defence industry, building and construction industry); topics could include:
 - What will be the future design trends and requirements of design?
 - How do you want to work together in a faster design development project across verticals?
 - Challenge our industry with impossible solutions.
 - Put one debate at the end of the Programme and discuss/wrap up presentations: social media, product design, 3D printing, electric cars/automotive/aerospace, 1 or 2 Technical Seminar presentations; determine what the adhesive tape industry is in for.
 - Have a member of each part of the entire adhesive tape value chain (tape manufacturer, raw materials supplier, machine supplier, converter) discuss what the future is for the value chain and its parts; link the entire chain together; how the members’ roles may change over time.
 2. Automotive industry/end user such as Nissan to discuss bonding techniques in developing the Leaf – Mr. Punter
 - What their vision is for their bonding suppliers
 - Nissan is French now; might be easier to recruit them
 - **Mr. Ponté** will try a contact he has.
 3. New frontiers in the French market: electronics, automotive, aviation, rail – Mr. Andreu
 - What future technology is going to be/look like; from the design aspect looking forward
 - France is one of the biggest markets in Europe; identify from Freedomia study what areas will be the new frontiers
 - **Mr. Andreu** will check with colleagues in tesa France

- **Mr. Mohme** will check with colleagues in 3M France
 - Trends in automotive – collaborative innovation, tapes enabling design of lighter cars, less CO2 development, etc. (Faurecia, one of the key players in the French auto industry) – Mr. Van Loon
 - Could try to recruit process and design engineers and tie them into the panel debate.
4. An everyday consumer of tape – Mr. Mohme
 - See #10, in which Mr. Konuralp has a contact within a Chinese customer which manufactures solar power panels using tapes (an Arcelik-type presentation)
 5. Autonomous cars – such as end user Bosch – Mr. Konuralp (has a contact in Turkey)
 6. 3D printing technology from the designer’s perspective – **Ms. Lejeune**
 - What they would like
 - How can tape play a role?
 - The future and where technology is heading.
 7. Computer-aided design (CAD) software incorporating tapes into its library of tools – Mr. Ponté
 8. Update on hydrocarbon resins and C5 global footprint given by Nellie Perry, Argus DeWitt Hydrocarbon Resin Newsletter – **Ms. Lejeune**
 9. Non-hydrocarbon solutions – Mr. Zetterman
 10. Investment in renewable energy transformation in plants / Market perspective on tapes used in renewable energy market – Mr. Konuralp
 - From the perspective of plants increasingly turning to renewable energy going forward
 - All tape cos. such as 3M, Nitto, Lohmann are involved in this; even someone from tesa could talk about this
 - Parafix is involved in energy production/storage through waste incineration at its business park
 - Or the market perspective on tapes used in windmills and solar energy sources
 - **Mr. Konuralp** will contact a Chinese customer re: discussing their use of tape in constructing solar panels
 - Mr. Punter has a contact through a UK wind farm project.
 11. Fuel cell technologies – Mr. Uenver
 12. Medical tape industry, insulin patches – Mr. Subramanian
 13. 1 or 2 Technical Seminar presentations – Mr. Von Schwerdtner, Mr. Konuralp
 - Biodegradable tapes – a trend; if it goes into adhesives, carrier materials, and liners, all the raw materials suppliers will be interested; would also appeal to converters
 - Update on/changes to chemicals regulation and the tape industry given by Amy Aerts, Nitto
 - **Ms. Lejeune** will determine this after seeing the presentations given at the TS.
 14. Design innovation through social media by a designer (**Mr. Van Loon**) – Mr. Andreu
 - Content marketing; website; (from theory to) real case of contact made with a designer who has chosen for tape (testimonial)

15. Education awareness – Mr. Von Schwerdtner

- New Afera programme in the TC; what Afera has to do to promote it – **Mr. Punter** will communicate Afera’s planned programme to Ms. Lejeune once he has met with the Edu. Prog. WG; he plans to recruit someone from an institute with whom to start a discussion re: the syllabus.
- Get someone from the PR branch of a trade institute (central body of mechanical engineering in a European country) to present, discussing recruitment of engineers, adhesive tape solutions, how they teach mechanical fastening today, and how to incorporate adhesive tape into that
- Contact Evert Smit and Reinhard Storbeck of Afera’s Technical Committee
- Ms. Wolska-Kinneging could check if she has a contact at faculty of mechanical engineering at Delft University
- Afera should check with large companies supporting engineering students in the Marseille area – Mr. Punter
- Someone to discuss E-learning about tape, but we should first know what we are going to do in education awareness before presenting about it – Mr. Ponté.

16. Workforce/HR development/buyer behaviour as an out-of-the-box or keynote presentation – Ms. Boyle

- Generation Y: Hiring vs. flexible, independent relationship
- “Today’s toddlers to teenagers are 2025’s buyers”; monitor the change in their behaviour, that is linked to technological development, expectations; very different from the buyers of ten years ago
- Could be a comedian joking about the tastes and habits of the new generation.
- On behalf of Afera, **Mr. Punter** will invite a member of the UK Institution of Mechanical Engineers to participate in Afera’s Marseille Conference
 - From a PR and influence perspective, it would be interesting to have someone from this organisation to be present at the Conference, to join in discussion panels, and to be influenced to enter into more discussion afterwards about working together on Afera’s education awareness project.

6. Afera Media Tools

6.1 Afera’s digital newsletters – feedback from MKC members: Feedback was generally positive.

- Current Conference topic choices will continue along the same theme as they are “good” and “relevant”
- Every 2 months is sufficient; more often is not necessary
- Quick, easy links should be the main focus
- To reduce scrolling, the following will be shortened/abbreviated:
 - Titles of contents in sidebar
 - A Word from the President.
- A direct link will be added to each new Member mention
- **Ms. Lejeune** will eliminate the top image
- **Ms. Fulton** will ask **Ms. Feith** to send news request to Members
- **Ms. Lejeune** will extract the newsletter circulation list from their database

and send it to **All MKC Members** to determine if their company subscriber lists are current.

- 6.2 Afera's website (already discussed under item 2.3):
- **Ms. Lejeune/Ms. Feith** will determine which Members have an RSS feed and subscribe to it for afera.com.

7. Other Matters (submitted prior to the Meeting)

- 7.1 As Mr. Punter will not be present at the next MKC Meeting and Annual Conference in Marseille, **Mr. Mohme** and **Mr. von Schwerdtner** will take over his responsibilities. Mr. Mohme will chair the MKC Meeting on Tuesday, 6 October, and Mr. Von Schwerdtner will present the MKC report during the General Assembly on Thursday, 8 October. They will both be present to give the MKC report at the Steering Committee Meeting on Wednesday, 7 October at 13.00 and afterwards to prepare the MKC report slides for the GA with Ms. Lejeune.

8. Next Meeting, Closing

- 8.1 Next Afera MKC Meeting will take place on Tuesday, 6 October 2015 (Time TBA) at the Intercontinental Marseille – Hotel Dieu in Marseille, France, directly preceding the Annual Conference. **Mr. Mohme** and **Mr. Von Schwerdtner** will co-ordinate with **Ms. Lejeune** to determine the meeting start time, allowing for 4 hours.
- 8.2 The Chairman closed the Meeting.

Astrid Lejeune
The Hague, 20 February 2015

Disclaimer

Afera operates within the regulatory framework of competition law as set out by the European Union and national legal systems and respects all rules thereof. Afera actively raises awareness about competition law among its Members and encourages its Members to comply with these rules. The purpose of discussions within Afera is to identify general trends and market developments without identifying individual company data. Afera does not accept responsibility or liability for any type of restrictive agreements concluded by its individual Members during Afera Meetings or within the context of Afera events, in spite of the aforementioned precautionary measures.
