

Afera Marketing Committee (MKC) Meeting Minutes

Date: 6 October 2015

Time: 14.00 – 18.00

Venue: Intercontinental
Marseille Hotel Dieu, France

Present: Ryan Miller (3M Europe)
Sharon Boyle (Advance Tapes International Ltd.)
Annegret Lange (Evonik Industries AG)
Stefan Neuner (Neenah Gessner)
Louise Vincent (Parafix Tapes & Conversions Ltd.)
Anurag Yadav (Scapa)
Klas Zetterman (ITW PSA & Components Group)
Matthias von Schwerdtner (tesa SE)
Fritz Stock (tesa SE)
Bert van Loon (Independent Strategist), guest
Astrid Lejeune (Afera Secretary-General, Lejeune
Association Management)
Bathsheba Fulton (Afera Editor)

Excused: Michael Punter (Afera MKC Chairman, Parafix Tapes &
Conversions Ltd.)
Jean-Philippe Ponté (Ahlstrom)
Joanna Wolska-Kinneging (Avery Dennison)
Ralph Uenver (Lohmann GmbH & Co. KG)
Stefan Meirsman (Nitto Europe N.V.)
Suresh Subramanian (Organik Kimya SAN. Ve TIC. A.Ş.)
Carles Andreu (tesa Western Europe B.V.)
Alberto Loro Lamia (The Dow Chemical Company)

Chairman: M. von Schwerdtner
Secretary: A. Lejeune
Date of Next Meeting: Tuesday, 2 February 2016 (13.00-16.00) at the DoubleTree
by Hilton Hotel, Amsterdam, The Netherlands. A tour at the
plot of the 3D printed canal house with Tosja Backer (DUS
Architects) will take place along with the Steering
Committee (SC) at 17.00 the same day, followed by dinner
with the SC.

Agenda

1. Opening/Agenda/Competition Law Compliance
2. Minutes and Actions of Meeting of 3 February 2015
3. Update on Creative Concept for "Ideas that Stick" Initiative
4. Afera Marketing Committee as Review Board
5. Afera Media Tools
6. Preparation of GA Slides on Activities, Results of MKC (2015 Report, 2016 Outlook)
7. Other Matters (submitted prior to the Meeting)
8. Next Meeting, Closing.

Note:

- Refer to the **Afera MKC Presentation 6 October 2015** slideshow for information co-ordinating with these Minutes.
- **Bolded, highlighted** names denote expected actions. Unless otherwise stated, **all actions are to be completed by the next MKC Meeting on 2 February 2016.**

1. Opening/Agenda/Competition Law Compliance

- 1.1 As MKC Chairman Mike Punter was unable to attend, Matthias von Schwerdtner chaired the Meeting as was agreed in February.
- 1.2 Afera's Competition Law Compliance Policy was reviewed, confirmed by all present.

2. Minutes and Actions of Meeting of 3 February 2015

- 2.1 Minutes were approved, signed as a true record of proceedings. Actions included in Minutes are covered in below agenda items.
- 2.2 Converter input (update on any issues raised by converters):
 - Klas Zetterman reported that he had not received any information from Mr. Punter to share on this topic.
 - Additional information about converting has been published at afera.com.
 - Ms. Lejeune reported her progress in recruiting converters starting with a dated list she had. Unfortunately the MKC had contributed minimally to updating this. Mr. Punter provided her with an updated list for the UK. Ms. Lejeune sent letters to all the contacts she had. Of 18, six were interested in learning more about Afera. A new converter contact from France was attending the Conference. It was noted that approaching parties individually was an effective recruitment strategy. See attached **UK Converters 15072015** document.
 - **Bathsheba Fulton** will develop Q&As on Afera's website to cover the benefits of joining Afera for each type of Member, including converters. She will begin by reviewing a list of possible questions with Mr. Punter. **Ms. Fulton** will also develop a case study of a converter member for posting on

Afera's website. The following elements will be addressed/included/-considered:

- Style them after a real company, making converters feel like they are missing out/outside the group by not being a member (American-style)
- Make them realistic
- Companies will be impressed if they read about one of their competitors in a case study
- A membership benefit to converters is that they get to network with big tape companies at Afera events, a type of forum they don't regularly have access to
- Converters want to know who is attending Afera events
- An international spread of converters is important
- Many membership benefits to converters are the same as those for tape manufacturers (getting the word out that adhesive tape solutions are good for everyone)
- In 'Why join?', mention that converters can view Afera's member list
- Most converters active in the automotive industry will be interested
- Converters are very entrepreneurial; frequently it's the owner who will decide whether to join
- Anticipate converters' thorny questions about membership and tackle them head-on.
- 'Developing an interactive session specifically for converters at an Afera event' will be discussed at the next MKC Meeting (**item for agenda – Ms. Lejeune**). Discuss the question: Would they be afraid to meet competitors in the marketplace?
- **Mr. von Schwerdtner** and **Mr. Punter** will establish a criteria table for candidate converters and send this in November to the MKC. The current converter list will then be updated (expanded) by below-mentioned MKC Members per region, each entry (both new and old ones) with the following details by the February Meeting:
 - Converter or just a slitter?
 - Company size
 - Target markets
 - Contact information of manager (including name, email address).
- Specific assignments:
 - Germany, Austria, and Switzerland – **Matthias von Schwerdtner**
 - Nordic countries – **Klas Zetterman**
 - Benelux – **Joanna Wolska-Kinneging**
 - Italy and Iberia – **Carles Andreu; Annegret Lange** will liaise with her sales contact there
 - Iberia – **Ms. Lejeune** will also check with a contact
 - Eastern Europe – Afera Pres. **Metek Konuralp, Mike Punter**
 - France – **Anurag Yadav**
 - U.K. – **Sharon Boyle** will double-check current list.
- **Ms. Lejeune** will circulate her current converters list among the MKC.
- At the February Meeting, **the MKC** will then look at the condensed list of 20-30 relevant candidates, try to understand what they do and want, make a membership proposal to them, and organise the Annual Conference agenda with these converters in mind.

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:

Membership Recruitment WG: This activity will make up one of Afera's pillars going forward. Actions will include updating the SG's current database.

Perhaps Afera could work with the PSTC on developing its own version of a quality certification programme like their [Responsible Tape Manufacturer \(RTM\) Program](#)?

- At Afera's TC Meeting the following day, it was decided that TC Member Reinhard Storbeck (tesa) would discuss this topic with **Mr. von Schwerdtner** and put it on the agenda of the TC's next Meeting (**item for agenda – Ms. Lejeune**).

Membership Satisfaction Survey

- The MKC gave its approval to run this at the end of 2015.
- A WG consisting of Mr. Neuner, Mr. Anurag, Mr. von Schwerdtner, Ms. Lejeune, and Ms. Fulton drew up a draft questionnaire (*which was fine-tuned the following day at the SC Meeting*). **Ms. Lejeune** will send a rough draft of the Survey, which will be conducted at the end of 2015, in November to the WG for their review; and hold a follow-up call with the WG if needed.

Website Management WG: Sharon Boyle updated the MKC on the WG's significant progress in developing and measuring afera.com (see slides 5-18), which is moving from the clean-up stage to the polishing stage.

- **All MKC Members** will answer email requests from the WG, including those for application and product images for use on afera.com.
- The WG will use any images necessary from tesa's website.
- **All MKC Members** will ensure that their companies publish the "Member of Afera" logo on their websites. This includes **tesa (in progress)**, **3M**, **Evonik**, **Neenah Gessner**, **Ahlstrom**, **Avery Dennison**, **Lohmann**, **Organik Kimya**, and **The Dow Chemical Company**. See attached **Member of Afera Logo 19052015** in two formats.
- On behalf of the MKC, **Mr. von Schwerdtner** will request a budget of €6936 for SEO work for 2016.
 - At Afera's SC Meeting the following day, the SC agreed on a budget of €20,000 for an integrated content marketing and social media programme, including above amount for SEO work.
- The MKC gave its approval for the Website Management WG to continue in its current form.
- **Website Management WG** will look into creating summaries with links to various white papers/content on tesa's website. Exact procedure will be optimised for Google Analytics.
- Website page word count will be kept to 350 to 500 words.

Annual Conference WG: Mr. von Schwerdtner and Ms. Lejeune reviewed the involvement of commodity tape manufacturers in Afera's activities according to Ms. Fulton's report emailed to the MKC on 24 September.

- **Stefan Neuner** will ask Marco Zucchiatti, Sicad, during the Conference if he would join Afera's MKC. He will also speak with Matteo Pellegrini, PPM, about his Conference speaking cancellation.
- Mr. von Schwerdtner suggested that Afera talk directly with Assogomma re: what its members would like out of membership in Afera. At Afera's SC Meeting the following day, it was agreed that Ms. Fulton would produce a presentation on the benefits of Afera membership/participation in Afera events to be delivered at Assogomma's next meeting by SC Member Filippo

Antonelli, 3M Italy.

Education Awareness WG: This topic lies with the TC.

- *The TC decided at their Meeting that it would move forward with this initiative, TC Chairman Evert Smit stating that he would liaise with the SNCP and PSTC on this subject; and organise both a conference call and face-to-face meeting with the dedicated TC WG in downtown Neuss (D) soon. **Mr. Yadav** will serve as the contact between the MKC and TC.*

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

3.1 Update and summary of activities and results: See slides 21-34.

- Social reach of creating more visibility of tape for designers is working through the “Design that Sticks” Twitter project, which has 1,500 followers. Many companies would be very happy to have a direct line into this valuable designer audience. We could attract ~3,500 more European designer followers with more efforts put into creating and curating content. The idea is that they are then drawn from designer content to tape content and then to Afera’s directory. An organisational system needs to be set up to manage content, including more designer interviews.
- Mr. Van Loon has been working on this project as a strategic partner of Afera for the last 3 years, but he would like to have been further than we are right now. He will continue to support the social media project for 2016 with the same yearly effort as in previous years, but free of charge with the objective of integrating the project structurally in Afera’s organisation.

3.2 Next actions, way forward:

- **Mr. Van Loon** will accelerate the speed of the initiative and decide on the direction of strategic choices by drafting a plan for 2016 that is integrated with the Website Management WG’s process of meetings, planning actions, metrics, activities, budget proposals, etc. He will join the Web Management WG.
- MKC agreed that social media maintenance could be covered in 1-2 hours/week, either among the Web Management WG (Louise Vincent) or the engaged SEO company. The Web Management WG will address this at their next meeting once they have agreed upon a work structure (**item for agenda – Ms. Feith/Lejeune**).
- **Ms. Lejeune** will suggest some meeting options to the Web Management WG soon.

4. Afera Marketing Committee as Review Board

4.1 Moderated Day 1 and Day 2 Conference industry debates with speakers and audience:

- *Mr. Van Loon and Jean-Loup Masson’s (Novacel) moderation during the following two days of the Conference was received extremely positively, particularly because it was spontaneously interactive with the audience and questions posed to speakers were not scripted.*

- 4.2 Brief review of conference paper “The tape market: Outside in and inside out, growth and opportunities” to be presented on 9 October:
- The AWA study differs from the Freedonia study in that it goes deeper into market specifics, discussing ~20 different markets. The Freedonia study is more general, covering PVC and packaging commodities and raw materials. AWA doesn’t discuss strategy unless you pay for extra, specific analysis.
 - Final presentation slides can be downloaded at <http://www.afera.com/member-only/annual-conference-paper-archive-secure.html> if logged in as a Member.

5. Afera Media Tools

- 5.1 Afera’s digital newsletters – feedback from MKC members:
- *Afera News*
 - “A Word from the President” will be abbreviated with a link and posted where thematically relevant on Afera’s website
 - “Recent News” will just be a link itself – no displayed content in Newsletter
 - All other articles will just have one-line teasers with links, following “content rich, summary short” theme.
- 5.2 Afera’s website:
- See agenda item 2.3.
- 5.3 Advertising and sponsorship opportunities, especially member logo on afera.com:
- Advertising and sponsorship of Afera events and online is going well.
 - Advert click-throughs are currently measured in afera.com’s Google Analytics.
 - MKC should offer any feedback they have on improving Afera’s range of ad and sponsorship offerings.

6. Preparation of GA Slides on Activities, Results of MKC (2015 Report, 2016 Outlook)

- 6.1 Mr. von Schwerdtner, along with Ms. Lejeune and Ms. Fulton, prepared the MKC’s contribution of GA slides which were added to the GA presentation shown during the GA on 8 October.

7. Other Matters (submitted prior to the Meeting)

- 7.1 No other matters were discussed.

8. Next Meeting, Closing

- 8.1 Next Afera MKC Meeting will take place on **Tuesday, 2 February 2016 (13.00-16.00)** at the DoubleTree by Hilton Hotel, Amsterdam, The Netherlands. A tour at the plot of the 3D printed canal house with Tosja Backer (DUS Architects) will take place along with the SC at **17.00**.
- 8.2 The Chairman closed the Meeting.

Astrid Lejeune
The Hague, 30 October 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.
