

Reaching Marginalised/Commodity/Packaging/SME Italian Tape Manufacturers Project

- What:** Initiative to determine why certain Members, non-Members, interest groups, and industry/geographical categories are not visibly interested in or participating in Afera
- Why:** Understand how Afera can actively evolve to reach Members and potential Members and to serve the European adhesive tape industry more effectively
- How:** Through phone conferences held by Bathsheba Fulton with 5 leading tape manufacturing industry contacts
- Who:** Matteo Pellegrini, PPM Industries (I)
Johann Amoser, Monta (D)
Marco Zucchiatti, Sicad (I)
Lucio Trincia, NAR (I)
Eric Pass, Nitto Europe (B)
- When:** During April 2015
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Summary: Different from multinational companies, commodity and packaging tape manufacturers, especially Italian ones, are often SME family-owned businesses which work extremely hard for relatively small profit margins, with an intense focus on daily challenges involving raw materials, pricing, overcapacities, and marketing strategies. Networking and information are the greatest priorities of these Members and potential Members in belonging to a specialised industry association.

Most commodity/packaging tape manufacturers are focussed primarily on the Annual Conference and its attendees. An industry association needs to appeal effectively to this group by offering a high-level annual get-together which is presented as a serious business opportunity in a reachable destination, with many high-quality participants (their entire value chain, including distributors), structured networking opportunities (apart from the social programme), a time-efficient, relevant working programme, low participation fees, and business-like corporate messaging.

Members and potential Members must have the perception that participating in Afera will bring them sufficient benefit. If this is achieved, according to specific feedback, the membership fee amount is negligible. Afera is the only purely European organisation which actively and personally specialises in serving and representing the adhesive tape industry, including the myriad evolving challenges that its members face every day.

As one of the above professionals mentioned, it is important to have a professional organisation supporting the commodity/packaging/Italian adhesive tape manufacturing business, that is utilised by Members as a tool for furthering their business objectives, in this case, optimising sourcing, products, production, and marketing. The language barrier may pose an issue, yet not one contact seriously advised that language services should be employed by Afera, as the Association's potential benefits greatly overshadow this issue.

Recommendations: *(The following recommendations are made realistically based on feedback gathered during the calls)*

- Afera needs to address commodity/packaging tape industry daily topics and challenges in its events, projects/activities and publications:
 - Classic packaging tape buzzwords, including
 - strapping
 - PVC
 - polypropylene
 - mono-oriented polypropylene (MOPP)
 - filament (polypropylene or polyester film and fibreglass filaments)
 - masking
 - mono-oriented paper
 - polypropylene and PVC film producers
 - etc.
 - Raw materials variations worldwide, including resins (which have particular crossover with specialty tape manufacturers), synthetic rubber, natural rubber, additives, pigmentations, etc.
 - Machine suppliers (coating, converting)
 - Sourcing
 - Pricing
 - Overcapacities
 - Efficiency, quality, and costs
 - Marketing strategies (including studies geared toward packaging tape manufacturers or the packaging industry as a whole).

- Offer at least two presentations per event that are specifically geared towards (or have crossover with) commodity/packaging tape manufacturers, in order to attract at least 5-10 more participants. Possible topics include
 - Raw materials
 - Customers, suppliers, distributors, converters, or other value chain partners – and not scientists or politicians – discussing strategies and trends (*Matteo Pellegrini has committed to helping Afera book a multinational customer of Italian tape manufacturers for the Marseille Conference*)
 - Legislation on environment and product safety
 - A special 2-hour presentation created on increasing efficiency and lowering costs.

- Apart from possibly the special 2-hour presentation on increasing efficiency and lowering costs, do not separate commodity/packaging and specialty manufacturers in terms of presentations, activities or entire events.

- Involve more raw materials suppliers and customers (distributors) at events in general.

- In order to improve the PR of the event to Italian SMEs, develop Afera Annual Conference online and printed materials to emphasise the business end of the event, including

networking opportunities, rather than the social end. Without necessarily modifying the social programme itself, consider decreasing its publicity, especially re: the partners' programme, i.e. only briefly mention social programme in messaging and reduce the number of (touristy) photographs. Eliminate the perception that the Conference is a social event for multinationals such as 3M, tesa, Eastman, and ExxonMobil.

- Ensure that all Annual Conference destinations are centrally located and not perceived as touristy. (*Hamburg is seen as a practical choice*).
- As networking was unanimously identified as the top reason for participating in Afera and attending its events, incorporate this principle into the building and messaging of all Afera's events and activities.
- Lengthen coffee breaks during events, especially during the working programme of the Annual Conference, as Italian SMEs prefer to hold meeting during these breaks over trying to communicate about business during the activities of the social programme.
- Allocate meeting rooms for use by participants during event working programmes.
- Keep event participation fees as low as possible.
- As the quality and number of participants attending the event is seen as the most important aspect, spend more time via phone/in person recruiting Annual Conference attendees, especially (SME) tape manufacturers, large European distributors, large printers, machine and raw materials suppliers (films, resins, incl. polypropylene and PVC film manufacturers), and converters. These make up the most important elements of the packaging tape value chain.
- Spend more time recruiting commodity/packaging tape Members to sit on the Committees.
- Set up a meeting and communication with Matteo Pellegrini, as he has offered to further Afera's objective of better representing marginalised/commodity/packaging/SME Italian tape manufacturers; and ensure that he attends the Marseille Conference.
- Talk to/build up Afera's relationship with Assogomma, the Italian rubber manufacturers' association.
- Attend Ipack-Ima to speak with attendees there (but determine if Vibac, Magis, and MAC Fralex will be present as Marco Zucchiatti said they wouldn't, as they are also not part of Assogomma, for political reasons).