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Marketing Committee

2 February 2016

13.00 – 16.30 hrs.

Double Tree by Hilton, Amsterdam

Room: Leeds 1

MEMBERS COMPLYING WITH COMPETITION LAW

In order to protect the interests of individuals and member companies, while active within Afera (in the broadest sense), the Competition Law policy should always strictly be followed.

- 1) Do not agree on nor discuss prices, (including price increases and pricing methods), discounts, terms of sale, the refusal to deal with another company, or profit margins with any representative of any Afera member company;
- 2) Do not make announcements about your prices or those of competitors;
- 3) Do not talk about the plans of individual companies (yours or competitors') regarding specific geographic or product markets or regarding particular customers;
- 4) If in doubt consult the Associations' staff or legal counsel.

- | | |
|--|-----|
| 1. Opening / Agenda / Competition Law Compliance | MP |
| 2. Minutes and Actions of 6 October 2015 Meeting | |
| 2.1 Status Q&A's on Afera's website to cover the benefits of joining Afera | BF |
| 2.2 Development of an interactive session at an Afera event – would they be afraid to meet competitors in the marketplace? | MKC |
| 2.3 Status establishment criteria table for candidate converters & current list expansion by appointed region representatives MKC members on agreed criteria in last meeting | MKC |
| 2.4 Progress of MKC topic-driven WG's developed according to Afera's mission to 'grow the pie' for all companies in the European adhesive tape value chain: | |
| - Social media programme <i>status report under agenda item 3</i> | |
| - Website management – <i>report under agenda item 3</i> | |
| - Education awareness – <i>outcome discussion TC</i> | ES |
| - Membership recruitment – <i>status membership satisfaction survey 2016</i> | AL |
| - General communications – <i>ongoing</i> | |
| - Annual conference – <i>discussion under conference agenda item</i> | |
| 3. Update on Creative Concept for “Ideas that Stick” Initiative | |
| 3.1. Website management – SEO work, content, image database, goal, next steps | SB |
| 3.2 Update and summary of activities and results, next steps | BvL |
| 4. Afera Annual Conference 4-7 October 2016 | |
| 4.1 Review/consideration comments Marseille conference | MKC |
| 4.2 Outcome brief survey on prioritised conference topics and theme | MKC |
| 5. Afera Media Tools | |
| 5.1 Afera's digital newsletters – <i>feedback from MKC members</i> | MKC |
| 5.2 Advertising and sponsorship opportunities – <i>esp. member logo on afera.com.</i> | AL |
| 6. Other Matters (please advise on any items for inclusion prior to the Meeting) | MKC |
| 8. Next Meeting, Closing | MP |

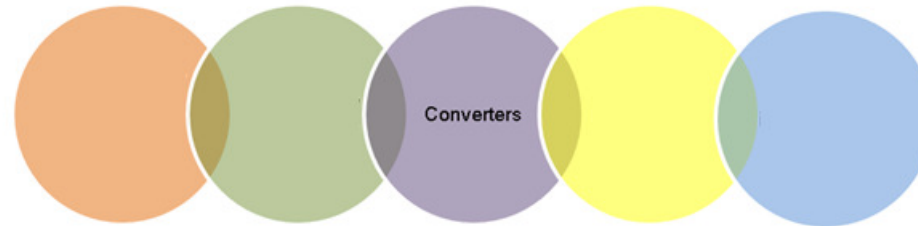
2. Minutes and Actions of 6 October 2015 Meeting

- 2.1 Status Q&A's on Afera's website to cover the benefits of joining Afera BF
- 2.2 Development of an interactive session at an Afera event – would they be afraid to meet competitors in the marketplace? MKC

<http://www.afera.com/about-afera/faqs.html>

<http://www.afera.com/about-afera/member-benefits/business-specific-member-benefits-and-testimonial.html>

Business-specific member benefits and testimonial



- Enjoy an unbiased forum where you can engage with like-minded firms to share market knowledge and enhance appreciation of your unique value to the markets' end user customers
- '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?

2.3 Status establishment criteria table for candidate converters & current list expansion by MKC appointed region representatives MKC members on agreed criteria in last meeting

- **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. **Mete 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.

2.4 Progress of MKC topic-driven WG's developed according to Afera's mission to 'grow the pie' for all companies in the European adhesive tape value chain:

- Social media programme *status report under agenda item 3*
- Website management – *report under agenda item 3*
- Education awareness – *outcome discussion TC*
- Membership recruitment – *status membership satisfaction survey 2016*
- General communications – *ongoing*
- Annual conference – *discussion under conference agenda item*

ES

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Education Curriculum / Awareness WG

Afera

Update 1

7 October 2015, Marseille

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EduCa Working Group

- Anurag Yadav – Scapa
- Kelly Anderson – 3M
- Martijn Verhagen – Lohmann
- Reinhard Storbeck – Tesa
- Bart Forier / Donald Pinxten - Nitto
- Evert Smit – AZC / Lohmann
- *(and Jean-Loup Masson (Novacel) active too!)*

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Target of the Educational Curriculum

- Develop plan to get adhesives / tapes on the radar screen of teachers / professors at specific universities (applied or academic)
- Raise awareness of these technologies as solutions for (engineering) students in:
 - Design
 - Building & construction
 - Automotive
- and to a lesser extend / lower priority:
 - Medical
 - Electronics

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Joint effort

- The effort **MUST** be a Afera-event, it should be linked to the industry, not seen as an advertisement for any specific company
- Marketing Committee involved and updated – they strongly support this initiative!

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Marketing Committee input

- 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 (Organik) will join from the MKC side

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On institutions:

- Targetted institutions need to be identified & contacted
 - We envision specifically Tesa, 3M, Nitto, Scapa and Lohmann to take the lead here
 - Each in their own area in Europe, they are asked to find and set up – with the help of the WG – direct links to professors.
 - We are thinking of e.g. Munich, Reutlingen, Lyon, Kaiserslautern, Eindhoven, Delft, Enschede, etc.
- HR of the mentioned companies may want to be involved
 - Partly for recruiting good people “on the go”.

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Ideas

- Give a “Tape-Tech-Day” at the school / institution, sponsored by all (& Afera?)
- Afera stand on career events
- 1 Brochure for schools from all – focus on “What’s in Tapes for You”
- Think about mega-themes that will appeal to the students, where tape can help
(like “Sustainability” as we discussed in the S-WG)

Side-note: the Afera presentations may need to be more “professional” (like PSTC) to appeal more to more “outsiders”. ES contacted PSTC (Roopram Ramharack) already for best practice sharing

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Interesting to see – workshops /
webinars (end October)

- **Adhesive and Tape Technologies to Replace Mechanical Fasteners:** presented by Shari Loushin, 3M's Industrial Adhesives and Tapes Laboratory. (Webinar)
<http://www.power-eng.com/marketwired/2015/07/16/the-2015-assembly-show-offers-extensive-conference-program-featuring-three-half-day-workshops-educa.html>

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Progress made

- From resonance in Afera: clearly a need
- Contacted several Universities / Institutions and many options for more
 - tbd in session by Jean-Loup, Reinhard, Martijn, Evert
 - As there are many
 - France: Uni Pau, ESPI, Mulhouse
 - Germany: Karlsruhe
- C&E Europe listed, *Nordic*, UK, I: open
- Thinking about contacting e.g. Lab & Training Centre Rescoll
 - <http://rescoll.fr/home.php>

Progress made

- Presentation this week, day 2! *(by Bruno Muret, Economy and Communication Department Director – SNCP, French Rubber Manufacturers' Association)*
 - **“A training programme to promote double-sided tapes to engineering students”**
 - Cultivating new thinking: In 2015, French manufacturers of adhesive tapes developed a short training programme for students of engineering schools, with the objective of promoting double-sided adhesive tapes as an alternative to traditional joining methods.
- JADH Conference as place to reach students etc.:
<http://www.vide.org/jadh2015/>
 - Are their conferences like this elsewhere?
 - MKVS – FH München
 - UK Adhesive Soc.: <http://www.iom3.org/society-adhesion-adhesives/society-adhesion-and-adhesives-background>

A F E R A M K C

What do you expect to gain from your association membership over the next few years?

- Support for growing the potential applications for PSA tape. Better understanding of which markets and segments are growing
- Contact/networking, which colleagues from partners & competitors updating on current trends and predictions for the future. Exposure to potential customers as a result of our links with Afera
- Stimulate ideas to grow the market share of tapes vs other bonding methods
- Industry knowledge
- Stimulate partnerships & innovation in the industry
- Update on trends, support on new legislations, lobbying
- Sharing of new applications of tapes
- Tape school for education of tapes
- More PSA producers to share and discuss; more speech
- Frequent market information
- Create more opportunities of contact with end-user groups, to maximize options for innovation
- Same diversity in market research vs AWA
- The hotel room, conference facilities etc – is excellent but very expensive. It is difficult sometimes to justify such an expense to management when business results are poor. Please ensure future conferences offer value for money in terms of choice of conference hotel, easy accessibility and relevance of conference presentations. We hope that the Afera conference continues to be relevant and thus attract more tape companies to participate/join
- Networking with suppliers but also competitors
- European harmonization of adhesive tape producers guidelines
- More general list content
- Opportunity to network, share best practice, be updated on key issues affecting our industry
- Stay super close to regulatory affairs. Afera to take a strong position → maybe create and finance a position (full time) as MD to represent Afera
- Structured and organized plan to deploy the use of PSA as a part of Std. engineering study programs
- Much more power to the tape industry
- Afera must be recognized as powerful tool for tape business in Europe
- Stronger involvement of all tape suppliers in Europe
- More technical background with Afera members; more networking
- Tape producers must be the centre of the conference and side (expensive) aspect must be reduced. It has no sense that most of players do not attend or are not in Afera. This is the goal, not have so many so suppliers and other players that know nothing of tape world
- New methods → more OEM's to participate; More info from the outside → trends
- Latest trends, be prepared for the future networking, engage other association PSTC
- How to reach more tape users. Tape expo?
- I'm not an Afera member but I appreciate to have that conference to meet actors of tape industry..of a commercial relationship

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

3.1. Website management – SEO work, content, image database, goal, next steps

SB

3.2 Update and summary of activities and results, next steps

BvL

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E
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A

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**Update Report
February 2016**

**Website Management
working group**

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Contents

- Overview document of various focus areas
- Actions completed since the last meeting
- Measures
- What next?
- What do we need from you?

Actions completed since the last meeting

- Budget approval gained to engage an SEO provider
- SEO partner appointed – Mad Lemmings (ML) based in Zurich (*Ashley Faulkes*)
- ML briefed on AFERA aims by Louise Vincent and Bert Van Loon
 - Action plan agreed with ML
 - Phase 1: *One-off activities*
 - Website Review & Implement most urgent changes
 - Overall structural changes to comply with Google requirements
 - Overall content improvement from SEO perspective
 - Phase 2: Ongoing Monthly SEO
 - SEO-content improvement for 'why tape' section

Actions completed since the last meeting

- In parallel, work continued within AFERA on improving content and structure of pages
(excluding the 'Why Tape' section; pending SEO advice)
- Significant progress made here by the team
 - Find a member base page completed
 - Technical centre section rewritten
 - News/Events and Members Only refinement completed
 - Images added
 - Industry calendar added

What next?

- 2 plans are in progress
 - A content plan
 - To include items such as designer interviews, blogs and any further material identified through the SEO analysis
 - This will need review by both the Technical Committee and our SEO provider
 - A social media plan
 - To target end users, specifically designers and engineers and answer the “Why Tape?” question, emphasising the benefits of adhesive tape
 - To target members and keep them informed of AFERA activity

What next?

- Aim to complete plans by **End of March 2016**
- Aim for plans to cover 2-3 month period and then review
- Next sub-committee meeting 30th March 2016

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What do we need from you?

- Feedback
- Advice on how to incorporate Educational marcom activities in this plan, with its separate scope
- Introductions to designers that would agree to be interviewed

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Thank you for your time

AFERA Website Management Working Group

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**Update
Afera Social Media initiative**

2 February 2016

4. Afera Annual Conference 4-7 October 2016

- 4.1 Review/consideration comments Marseille conference MKC
- 4.2 Outcome brief survey on prioritised conference topics and theme MKC

Number	Response Date	Suggestion 1
1	jan 29, 2016 10:43 AM	Future growth trends and challenges for PSA technology in key markets
2	jan 25, 2016 2:29 PM	Adhesives - What's new
3	jan 20, 2016 1:43 PM	Innovations and technological advancements in the adhesive tape industry
4	jan 20, 2016 1:25 PM	Customer Forums
5	jan 20, 2016 12:59 PM	End-user presentation/needs
6	jan 20, 2016 11:43 AM	Replacing mechanical fastenings incl gate crashing their party
7	jan 15, 2016 7:56 AM	showing differences between Afera test Methods and others
8	jan 14, 2016 3:44 PM	Automotive Electronics
9	jan 14, 2016 3:22 PM	more paper topics
		Suggestion 2
		Paper from a tape manufacturer - success story
		Regulatory environment in the adhesive tape industry
		Market Trends: impact
		Market trend
		More from tape manufacturers
		Need a good tape market study every year
		Air & Aerospace Industry - Airbus - Boeing
		raw material trends
		Future expectations from big PSA users towards our industry
		Suggestion 3
		Market overview and trends
		Novel applications for self-adhesive tapes
		Challenges facing the industry: +/-
		Raw material/Machine future trend
		More from end users about their challenges especially design
		More participation from end-users and brand owners as well as materials suppliers
		All kinds of Robots / Robot Technology
		less costly hotels
		Which disruptive new technologies will impact PSA usage (e.g. 3D printing)

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Afera Annual Conference 2016 Paper Topic suggestions

What could be a generic theme for this years annual conference?

Answer Options		Response Count
		6
<i>answered question</i>		6
<i>skipped question</i>		2
Number	Response Date	Response Text
1	jan 20, 2016 1:53 PM	Raising the performance bar in adhesive tapes
2	jan 20, 2016 1:01 PM	Weight reduction in General Industry
3	jan 20, 2016 11:44 AM	How do we react to the speed of change
4	jan 15, 2016 7:57 AM	listen to the market
5	jan 14, 2016 4:35 PM	What will be the striker : Evolution or Revolution in Adhesive Tape Technology ?
6	jan 14, 2016 3:22 PM	China

The Future of Adhesive Tape Industry from the perspective of 4th Industrial Revolution...

As you know in the near future production, processes, human , robots and big data will be all synchronized and this transformation will trigger so many aspects in industry and its related parties. It will be interesting to get insights from both our industry experts , other thinkers and also the customer in order to feel where our industry will be placed in such big revolution.

I happened to watch the movie “THE MARTIAN” over the weekend and it seemed like an advertorial for the adhesive tape industry because whenever the main character had a problem on Mars, he solved it using adhesive tapes – thought I should mention it to you – you could find good use for this movie in presentations and events.

5. Afera Media Tools

- 5.1 Afera's digital newsletters – *feedback from MKC members* All
- 5.2 Afera's website (*already discussed under item 2.2*)
- 5.3 Advertising and sponsorship opportunities – *esp. member logo on afera.com.* AL

<http://www.afera.com/news/afera-digital-newsletters/>

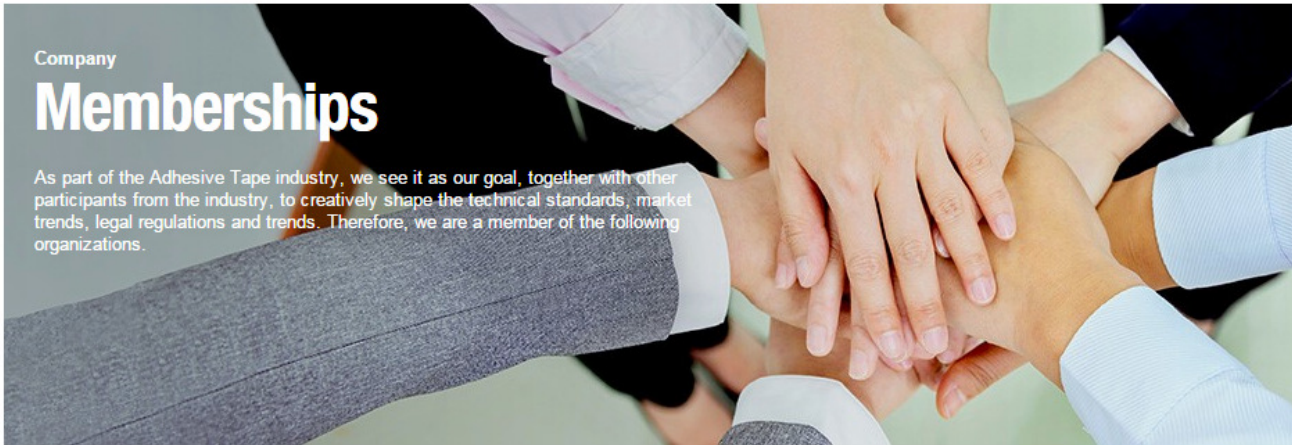




Company

Memberships

As part of the Adhesive Tape industry, we see it as our goal, together with other participants from the industry, to creatively shape the technical standards, market trends, legal regulations and trends. Therefore, we are a member of the following organizations.



Call us: +49 40 88899 0

Afera

Afera is the European Adhesive Tape Association, a not-for-profit trade association representing the interests of the best-in-class businesses and organisations within the adhesive tape value chain. The membership includes manufacturers, raw materials and machine suppliers, converters (such as printers, slitters, die cutters and laminators of adhesive tape), and national tape organisations. With over fifty years' experience in serving as the voice of the European adhesive tape industry, Afera engages its growing member base in networking and educational events, European and international test methods standardisation projects, and market and technical data and information resources. Afera is also Europe's leading promoter of adhesive tape over traditional mechanical fasteners and wet glues as the most innovative bonding and fixing solution to designers, engineers and manufacturers in every conceivable industry.

[More about Afera](#)



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Cable wrapping solutions for every environment
find out more »

Scapa

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Welcome to Scapa
Scapa is a leading global manufacturer of bonding products and adhesive components for applications in the Healthcare and Industrial markets.
At Scapa, we base our approach on a deep understanding of our core markets. This understanding allows us to anticipate tomorrow's customer needs. Scapa works closely with leading global partners in its target markets, developing specialised adhesive tape bonding solutions for OEM's, distributors and consumers.
Scapa has a true global footprint, with production sites in Asia, Europe and the US. Our worldwide service and supply chain capabilities place us in an excellent position to partner with global customers.
Find out more »

Our Markets
Scapa announces the launch of its new Healthcare focused website www.scapahealthcare.com
The new site has extensive content dedicated to the Healthcare market place, including information on our range of Scapa Soft-Pro® skin friendly adhesives, Bioflex® Performance Materials, and MEDIFIX Solutions™ wearable medical device fixation along with the company's broad manufacturing capabilities.
Scapa Healthcare Website »

Current share price: 189.50p -0.50p
Find out more»

News
AGM Statement
Scapa Group PLC ("Scapa"), a leading global supplier of bonding materials and solutions, is today issuing the following statement in respect of the quarter ended 30 June 2015 ahead of its Annual General Meeting to be held at 10:30am today. Click here »
Preliminary Results 2015
Scapa Group plc, a leading global manufacturer of bonding materials and solutions, today announces its Preliminary Results for the year ended 31 March 2015. Click here »
Year End Trading Update
Scapa Group plc (AIM: SCPA), a global supplier of bonding materials and solutions, is today providing a year end update for the twelve months ended 31 March 2015. Click here »


member of
The European Adhesive Tape Association
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Smooth and Transparent Bonding
discover our new baseless tape

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Latest IR Materials



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Procurement



Nitto Group Report



Member of **Afera**
The European
Adhesive Tape Association




What's New Press Release

2015/Aug/24 **Product Announcements**
World's First Magnetic Field Orientation Controlling Neodymium Magnet


2015/Aug/12 **Trade Show**
Nitro Europe present at MRO Aviation week in London, UK from 13-15 October

2015/Jul/30 **Company News**



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A guaranteed secure hold that you can rely on.

Adhesive Coating
Automotive
Construction
Industrial and Consumer Goods


Adhesive Coating

The high-quality polyolefin foams from Sekisui Alveo have proven themselves to be excellent carrier materials for specialty adhesive tapes. Thanks to their flexibility and conformability, adhesive tapes made from Sekisui Alveo foams are ideal for uneven surfaces and contours. These properties cannot be achieved in adhesive tapes with film, paper or textile carriers. Special Sekisui Alveo foam types are available at thicknesses of 160 µm and above.

They are tailored to the requirements of the fields of construction, footwear, flexo printing, DIY and electronics, as well as to automotive, industrial and medical applications. Special surface treatments can also be applied to allow customers to achieve an optimum adhesive coating. In addition to the broad range of standard products, we also offer customer-specific developments.

Properties and benefits


- Adhesive-friendly foam
- Very narrow thickness tolerances
- Excellent conformability
- High skin peel strength



Your contact

Applications

Downloads



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6. **Other Matters** (please advise on any items for inclusion prior to the Meeting)

MKC

8. **Next Meeting, Closing**

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