



Afera 2019 General Assembly

Making the tape business future-proof



Afera

The European Adhesive Tape Association

General Assembly

10 October 2019

Antitrust law: the dos

Important for your session

✓ You must ensure this!

Together with the chairperson of the meeting, make sure there is no antitrust violation in connection with an Association gathering. The following points must be strictly observed:

PREPARING FOR THE MEETING

✓ **Agenda items and meeting documents** may not contain any topics which might implicate antitrust law.

DURING THE MEETING

✓ **Restrict discussion to the agenda items** or activity programme set beforehand

✓ **Have the session fully minuted**

✓ **In case of spontaneous statements with antitrust content**, react immediately

and actively dissociate yourself from the violation:

• **Point out to participants** that this issue may not be discussed

• **If necessary, postpone the discussion** until you have received relevant legal clarification

• **If the discussion continues**, note your objection in the minutes, suspend the meeting or leave the meeting premises (also to be recorded in the meeting minutes)

• **Report the matter to the Secretary-General** of the Association and your company.

AFTER THE MEETING

✓ **The minutes of the meeting** should be concise and straightforward.

Antitrust law: **the don'ts**

Important for your session

×You must avoid this!

Employees of competing companies are prohibited from holding formal or informal discussions, exchanging information or entering into agreements on any of the following matters:

PRICES, in particular:

- ×**Pricing**, price differentials and pricing strategies
- ×**Individual sales and payment terms**, individual discount, credit notes and credit conditions.

PRODUCTION, in particular:

- ×**Individual manufacturing or sales costs**, cost accounting formulas, methods of cost calculation, figures related to products or product groups on procurement costs, production, inventories, sales, etc.

- ×**Production changes**, e.g. due to maintenance work, or the limitation of the market supply of a product.

FUTURE MARKET BEHAVIOUR, in particular:

- ×**Allocation of markets or sources of supply**, whether geographic or by customer
- ×**Relationships with individual suppliers or customers**, in particular where this could lead to their disappearance from the market
- ×**"Blacklists" or boycotts of customers**, competitors or suppliers
- ×**Proposed technology**, investment, design, production, distribution or marketing activities of individual companies concerning specific products.

- 1. Opening by Afera President Evert Smit**
- 2. Approval Minutes GA in Athens 2018**
- 3. Afera's Strategy Update**
- 4. General Report 2019 / Plans 2020**
 - 4.1 Report of the Marketing Committee
 - 4.2 Report of the Technical Committee
 - 4.3 Report of the Steering Committee
- 5. Financial Report**
 - 5.1 Balance sheet 2018
 - 5.2 Latest 2019
- 6. Approval of Budget 2020**
- 7. Membership fees 2020**
- 8. Composition Steering Committee**
 - 7.1 Overview current composition
- 9. Next Conference date and venue 2020**
- 10. Any other business**
- 11. Closure by Afera President**

Afera's strategy 2020-2025

The European adhesive tape network.

Networking and educational events.

Environmental regulation.

Market trends.

Technical standards.

Today and tomorrow's workforce.

Organisations in adjacent technologies.

Afera's strategy 2020-2025

Our vision

Afera is widely known and valued as the go-to community of the European tape industry for both industry and non-industry stakeholders. Stakeholders connect within the Afera community to address current and future key topics, which individual stakeholders cannot or prefer not to tackle themselves.

Our mission

Afera unites stakeholders along the value chain of the European tape industry, to ensure and increase the relevance of the tape industry in the world of tomorrow.

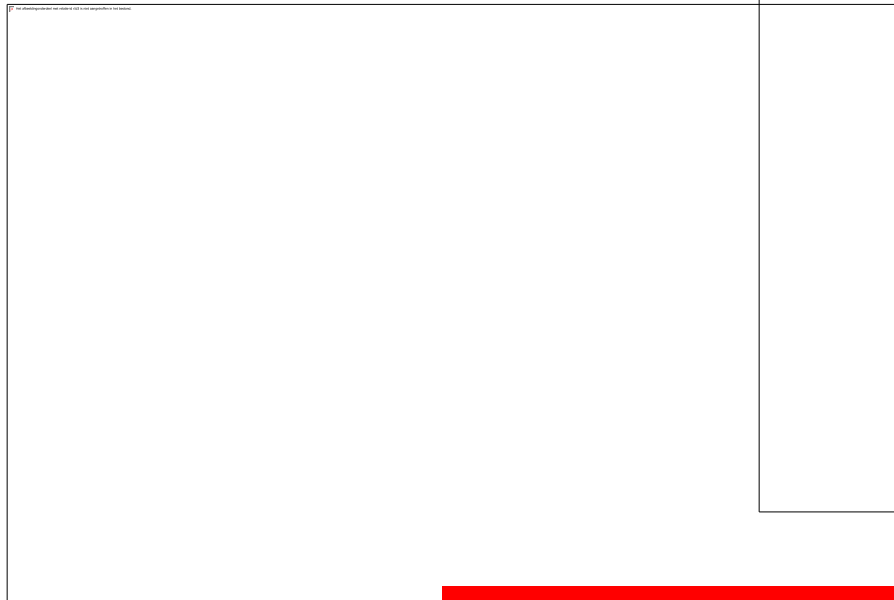
Afera's strategy 2020-2025

Industry Theme	Strategic Initiative	Activity/Working Group
People	1. Raise awareness of demographic changes in workforce	Survey Conference presentation, MKC CGE-WG
People	2. Team up w/associations in adjacent technologies	ES agreement, Reg-WG, Sus-WG, Edu-WG
People	3. Educating future industry workforce	Edu-WG
People	4. Educating new entrants to the industry	Tape College, TC-WG
Product/market development	5. Embedding adhesive tape tech in edu curriculum of mechanical engineers and product designers	Edu-WG
Product/market development	6. Promote knowledge/awareness of end-user application possibilities	CGE-WG, MarCom-WG
Environment/sustainability awareness	7. Increase industry perception/-awareness of necessity and that sustainability is an opportunity	Sus-WG
Environment/sustainability awareness	8. Promote end-user awareness about environmental PST success stories	Sus-WG, CGE-WG

Afera's strategy 2020-2025



Afera
Marketing Committee (MKC)
General Report 2019
Plans 2020
By Chairman Jacques Geijsen



Annual Conference 2019

Steering Committee
(SC)

Technical Committee
(TC)

Marketing Committee
(MKC)

Marketing
Communications

Future Workforce

Membership
Recruitment

Content Generation
& Engagement

Sustainability

MarCom: afera.com

Volz Selbstklebetechnik GmbH

Contact: Andreas Benz
Fischerinsel 3
D-79227 Schallstadt
GERMANY
+49 7664 50500 11
<http://www.volz-skt.de>



When it comes to providing high-quality, cost efficient, self-adhesive technology solutions, VOLZ® TAPES stands out. Since 2010, VOLZ® TAPES has been producing our own product line of electrical adhesive tapes, expanding that in 2014 to include double-sided tapes. Our extensive product portfolio offers a comprehensive range of self-adhesive tapes, electrical tapes, industrial adhesive tapes, packaging tapes, double-sided adhesive tapes, die-cut adhesives, and dispensing equipment from the world's leading manufacturers as well as from our own production facility.

Spending the last several decades developing our core competencies in the areas of coating, converting and distribution, VOLZ® TAPES has developed from solely a distributor into an industry specialist providing custom manufactured self-adhesive solutions. We provide turn-key, custom tape solutions to meet your most complex industry challenges. Our advanced production facility is capable of cutting any tape width and producing die-cut solutions to your exact specifications. We produce double-sided adhesive tapes with high-quality coatings and deliver them from small rolls to jumbos, and also in cross-wound spools.

Our self-adhesive technology solutions are anything other than typical. They are individually specialised to meet your operational demands. You can rely on VOLZ® TAPES' comprehensive self-adhesive technology expertise. Our sales and production teams offer decades of experience in the self-adhesive tape industry and with custom, die-cut stamped parts. Through providing personal consultation and on-going, direct support, we are committed to developing solutions of the highest quality and flexibility to meet all of your operational requirements.

„Member of Afera“ logo-link

OLYMPIC
BONDING SOLUTIONS

ABOUT OLYMPIC CAREERS CONTACT SEARCH

3000 SERIES 5000 SERIES 7000 SERIES CUSTOM SOLUTIONS

About OLYMPIC

We are a Western European Acrylic Foam Tape manufacturer with our own production facility in the Netherlands

In a market that continues to set more exacting requirements, Olympic Tape is developing new technology that will challenge conventional suppliers and their obsolete product lines. At Olympic, we can help you stand out from the pack by offering high-end, customized solutions at lower prices. The more we help you, the better you'll look.

Our company was born from our passion for acrylate chemistry and the belief that we could upend the industry with higher quality at lower prices.

Now, three years later—and by virtue of our patents in our chemistry and production—our products are demonstrably on a par or outperform the current industry benchmark.

And, just as important, we offer our products at guaranteed lower prices.

Olympic products use no solvents and are fully RoHS compliant.



"Our company was born from our passion for acrylate chemistry and the belief that we could upend the industry with higher quality at lower prices."

Excelling in a competitive market

The market for Acrylic Foam Tapes is growing fast. AFT is taking on an increasing number of applications. It can replace mechanical fasteners and liquid adhesives in permanent bonding applications that require high-strength adhesion. AFT is lightweight, strong and easy to apply. It is cheaper, easier, faster and far more versatile to use than obsolete materials such as screws or liquid adhesives.

We stand for experience, reliability and sustainability. This allows us to develop and manufacture products based on our in-depth knowledge. We understand the process and the chemistry like no other company.



Let us help you win your next tender →

STOKVIS TAPES

An Illinois Tool Works Company ITW

Home Capabilities Market Segments Contact Search...

You are here: Home

A better endproduct

No screws
No damage
Thin and invisible

Stokvis Tapes Worldwide
Choose your country...

Contact us?

Find your local contact
Send us an e-mail

NEWS

EFFECTIVE SOLUTIONS

5 Reasons to buy Stokvis Tapes

- 1 | WORLD'S LARGEST INDEPENDENT TAPE CONVERTER**
As an independent supplier we can deliver the best of all brands and offer you a complete tape package. Where assembly, protection, sealing, packaging, insulation, masking, identification or connection is an essential part of the production process, we will advise you on the appropriate tape solution.
- 2 | CONVERTING SPECIALIST**
With our production capabilities we can deliver not only the right tape for your application, but also in the right size and/or shape.
- 3 | LAB TESTING**
With our in-house laboratories we can provide you with a reliable solution with technical support.
- 4 | REPRESENTED WORLDWIDE**
Local language, same quality in all countries with short delivery times.

member of The European Adhesive Tape Association

Pressure-sensitive adhesive technology for engineering and design.

Activities

Statistics

Next steps

Social media

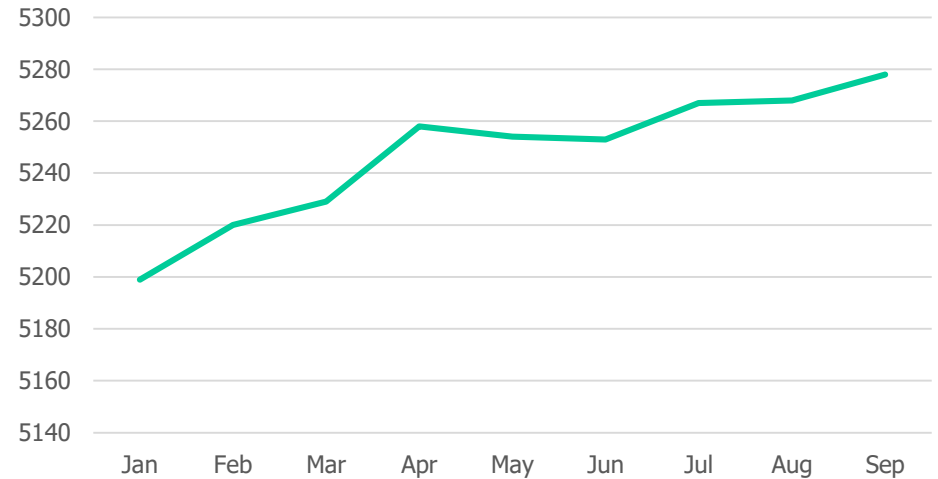
Design that Sticks

Scanning the web for Next Product Design

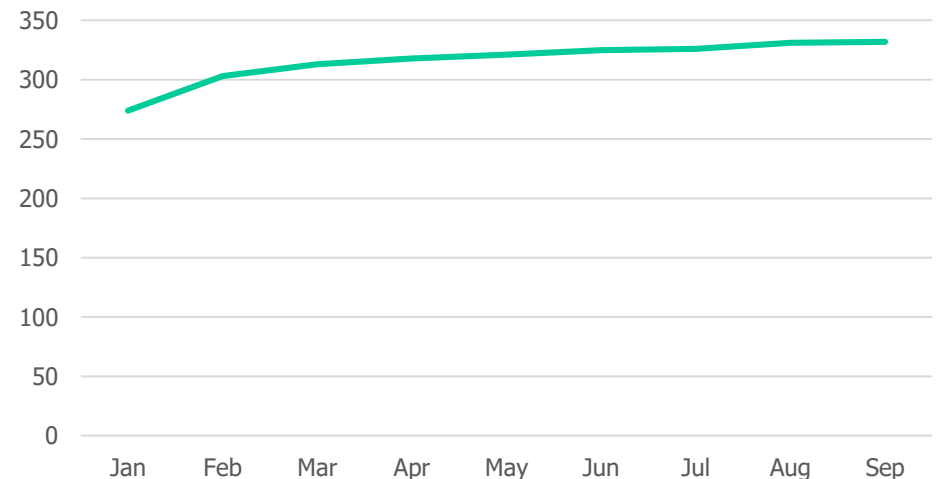


Current # followers	5278
Current # following	4100
Likes	202

Twitter (design) followers (end of month)



Twitter (member) followers (end of month)



Current # followers	332
Current # following	892
Likes	13

Activities

Statistics

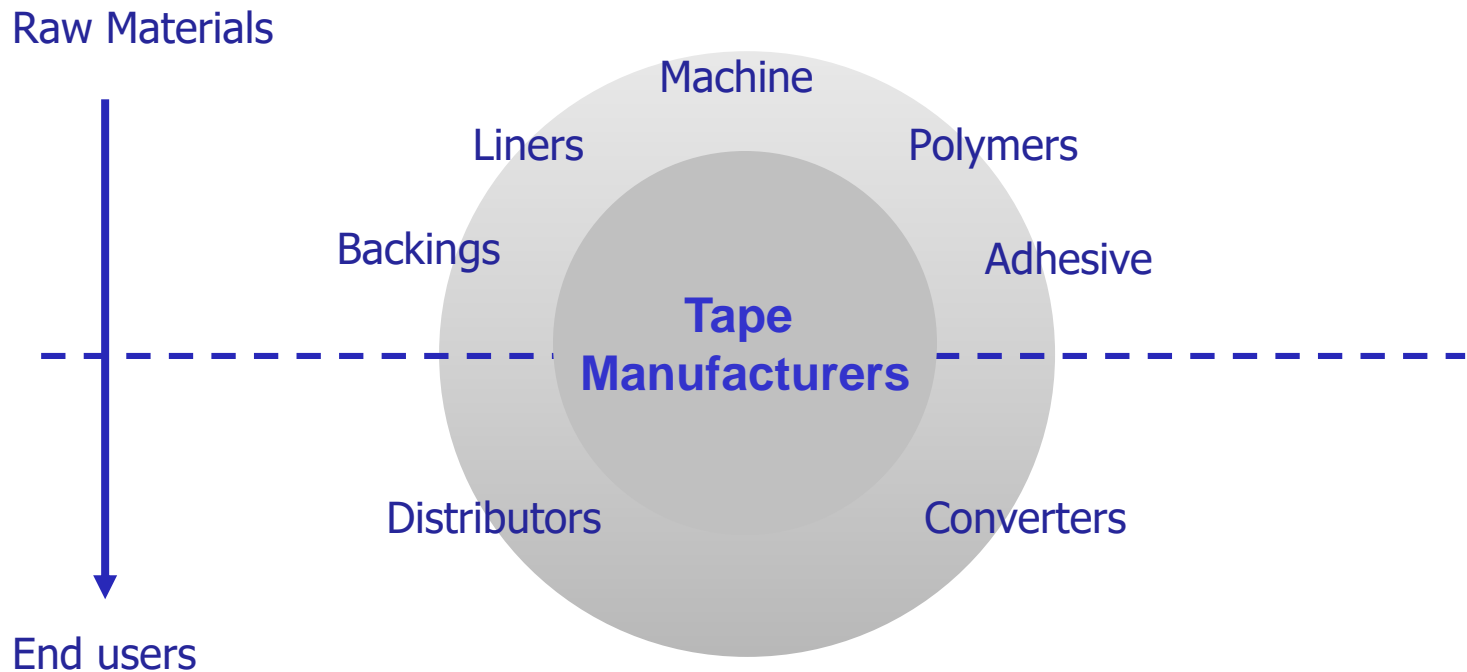
Next steps

LinkedIn

- From zero to 164 followers in 2019
- 37 posts
- Total impressions over 35K
- 348 clicks to Afera website
- Most activity is reported from the positions of business development and media & communications
- Pageviews nice average, spike in February due to LinkedIn campaign

Membership Recruitment

Maximize Quantity –or- Quality?



Objective: Afera represents the value chain of tape manufacturing in EU (market share)

Content Generation & Engagement

Channel	Technical	Marketing
Website	**	***
Social Media		***
Annual Conference	**	***

Annual Conference 2019

- Most valued event
 - Strong content
 - Outcome of membership surveys on megatrends
 - More interaction of attendees in the working programme



Sustainability



Afera 2019 General Assembly

Afera Technical Committee (TC) General Report 2019 Plans for 2020 By Chairman Reinhard Storbeck



The TC is a powerful tool

- Afera's TC is the group with the highest competence in technical adhesive tapes in Europe
 - It should be used as a sounding board for discussing and working on monitoring trends and acting on regulatory matters, creating new test methods, etc.



2019 achievements, actions forward

- Working groups
 - Afera's activation plan, addressing more topics
- 9th Tape College in Brussels, 8-10 April 2019
- Test methods WG
- Regulatory affairs WG
- Sustainability WG, a megatrend which should be followed closely
- Education awareness initiative > future workforce
- 9th Technical Seminar in Brussels, 6-8 April 2020

Committees and working groups



Working groups

TC Working Groups	
Afera Tape College Afera Technical Seminar (TS-WG)	Reinhard Storbeck, tesa, Leader Danny Beekman, Kraton Ian Grace, Loparex Ralf Rönisch, Coroplast Gert-Jan van Ruler, DRT Martijn Verhagen, Lohmann Michel Sabo, Nitto Europe
Regulatory Affairs (Reg-WG)	<i>TBD</i> , Afera Regulatory Affairs Manager Jeff Burrington, H.B. Fuller Alan Gilding, Advance Tapes Axel Hessland, IVK/FEICA Dirk Lamm, tesa Reinhard Storbeck, tesa Miriam Verbruggen, Lohmann
Test Methods (ad hoc, TM-WG)	Lutz Jacob, Leader Uwe Maurieschat, Fraunhofer IFAM Danny Beekman, Kraton Thomas Christ, BASF Ralf Rönisch, Coroplast Thorsten Meier, certoplast David Vanraes, Henkel Jürgen Pomorin, Evonik Jürgen Kahl, tesa

Working groups

Content Generation & Engagement WG (CGE-WG)	Thorsten Meier, certoplast, Leader Jeff Burrington, H.B. Fuller Alan Gilding, Advance Tapes
Sustainability WG (Sus-WG) Also a MKC WG	Ian Grace, Loparex, Leader + EPD Programme Teoman Köksal, A&G Ambalaj Jeff Burrington, H.B. Fuller Thomas Christ, BASF Nicolas Sajot, Bostik Jarno Weemers, Eastman Alan Gilding, Advance Tapes Axel Hessland, IVK/FEICA Annette Kelsch, Mondi Gert-Jan van Ruler, DRT Michel Sabo, Nitto Yasemin Seyren, Organik Kimya Reinhard Storbeck, tesa, EPD Programme Martijn Verhagen, Lohmann, EPD Programme

9th Afera Tape College 2019

- >100 newcomers to the industry from 14 European countries + U.S. and UAE
- Held 8-10 April 2019 in Brussels, a biennial event



9th Afera Tape College 2019

- 19 lectures on the fundamentals and current technical essentials of adhesive tape technology
- Has become an industry standard



Test methods

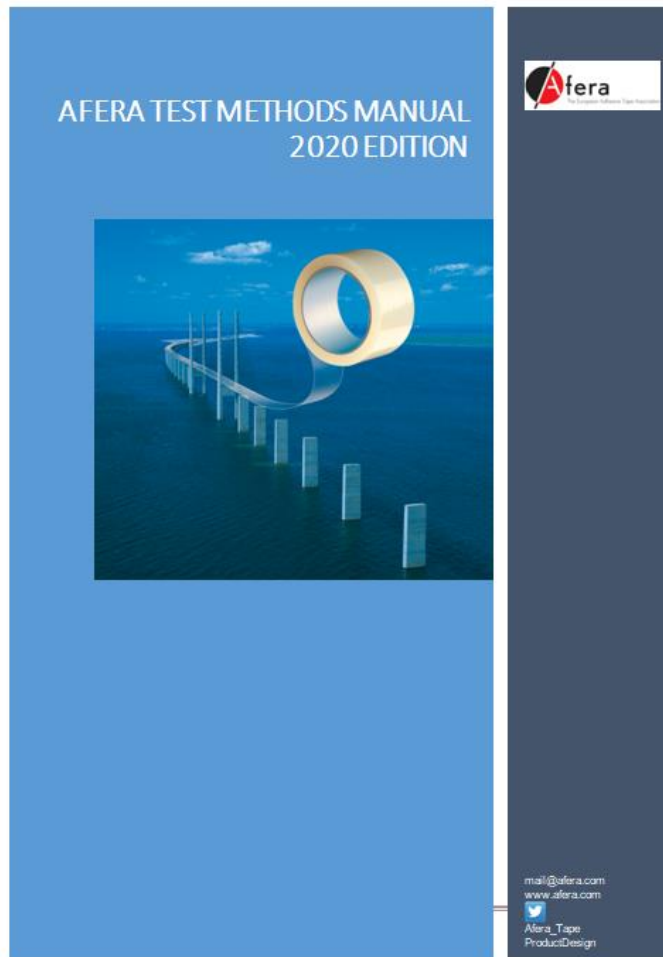
Implementation 2020:

- Dynamic Shear TM (w/PSTC)
- Test Panel Cleaning Study (w/PSTC)
- Methodology of Measurement Uncertainty/Variability Guideline (w/PSTC)
- Peel Adhesion Depending on Test Plate Surface Roughness TM



Test methods

- *Afera Test Methods Manual, 2020 ed.*



- 2019 surveys among TC and tape manufacturers to determine which TMs still in use
- Needs to be completely revised and edited, creating modern structure and design
- External consultant engaged

Next GTF & GTMC meetings

7th edition of Global Tape Forum and Global Test Methods Committee Meetings, 17-19 November 2020 at the Osaka International Convention Centre in Osaka, Japan, hosted by JATMA

Members:

- Europe (Afera, The European Adhesive Tape Association)
- China (CATIA, The China Adhesives and Tape Industry Association)
- Taiwan (TAAT, The Taiwan Regional Association of Adhesive Tape Manufacturers)
- North America (PSTC, The Pressure Sensitive Tape Council)
- Japan (JATMA, The Japanese Adhesive Tapes Manufacturers Association)



Next GTF & GTMC meetings

Chairman Ikusuke Shimizu's call for speakers and sponsors of Osaka 2020 meetings

- Each counterpart to deliver 3 speakers/-presentations

Current positions

GTF Chairman: Michael Yang (CATIA)

GTF Vice Chairman: Michel Merx (PSTC)

GTMC Chairman: Kiran Malhotra (PSTC)

GTMC Vice Chairman: Uwe Maurieschat (Afera)

Secretary: Astrid Lejeune (Afera)



Test method harmonisation

Adopted by the GTF in 2018-2019 and published on Afera's website:

GTF 6001 (SAFT)

GTF 6002 (Thickness)

GTF 6003 (Width & Length)

GTF 6004 (Peel Adhesion)*

GTF 6005 (Breaking Strength & Elongation)*

GTF 6006 (Static Shear Adhesion)*

GTF 6007 (Loop Tack)

+ Approval process of acceptance of new TMs for harmonisation

*For all national bodies, ISO-certified TMs to retain their official ISO numbers but referred to in their manuals by their GTF numbers as well



Regulatory affairs

- Regulatory landscape will change the way we all operate over the next decade
- We need to inform and support each other in transitioning our businesses
- Putting an Afera regulatory manager in place and driving a more active WG

Regulatory affairs



- Seeking new Afera Regulatory Affairs Manager
- Step up lobbying activities
 - Industrial Emissions Directive(IED) BREF STS revision
 - REACH Cross-Sector Group, Brexit scenarios
 - PACT-RMOA and hazard assessment activities under REACH
 - Classification, Labelling and Packaging Regulation (CLP)
 - Restriction of Hazardous Substances (RoHS) Directive
 - Chemical Agents Directive
 - Biocidal Products Regulation
 - Packaging and Packaging Waste Directive
 - European Paper Recycling Council (ERPC)
 - International Confederation of Paper and Board Converters in Europe (CITPA)
 - Food Contact Materials Regulation
 - Circular Economy Action Plan and Ecodesign Directive, Single-Use Plastics Directive
 - Environmental product declarations (EPDs)
 - Rapid Alert Protocol

Afera Steering Committee General Report 2019 Plans for 2020

**by President
Evert Smit**



PSTC 2019 Tape Summit

- Held in May 2019 at the Marriott Baltimore Waterfront in Maryland
- TECH 42 meeting, PSTC's technical committee
- Themed industrial seminar, the Building & Construction Industry: Markets and Application Track
- S. Smit delivered "The building & construction industry: a European view" in which he compared and contrasted uses in the European B&C market
- Many end users in the audience
- Providing "the voice of the market"
- Each of the PSTC's future Summits will focus on a specific area of the tape industry, cueing in on growth areas of our business
- Afera may move in the direction of organising our events this way

CATIA event



Working with FEICA, IVK, FINAT

- The 3 associations have taken steps to work together where activities overlap
 - Afera represents producers of articles
 - FEICA and IVK represent producers of substances and mixtures
 - FINAT represents producers of labels
- Knowing our roles and boundaries
- Areas of co-operation identified:
 - Regulatory and environmental issues
 - Future workforce, education and public affairs
 - Sustainability
 - Circular Economy
 - Institutional research



Members

Active: 44

Associated: 47

Converter: 12

Affiliated: 4

Total: 107

New: 6

Exited: 3





**Financial Report
Balance Sheet 2019
Budget & Latest Estimate 2019
Budget 2020**

Afera

Association for the self-adhesive tape industry

	Actual	Actual	Budget	Projection	Budget
	2017	2018	2019	2019	2020
	Euro	Euro	Euro	Euro	Euro
INCOME					
Membershipfee	223,650	228,950	228,950	236,850	252,450
Events					
Annual conference fee and sponsoring	153,801	149,680	140,000	170,400	150,000
Technical Seminar (Global Tape Summit 2018)	0	193,335	0		85,000
Tape college fee and sponsoring	75,663		70,000	87,395	0
Media					
Adverts digital Afera newsletters	925	875	875	875	875
Banners website	5,000	5,000	4,000	6,000	4,000
Other Income					
Financial income (interest)	54	0	50	0	0
Other income (test methods, settlement VAT)	150	1,934	1,000	1,000	1,000
TOTAL INCOME	459,242	579,774	444,875	502,520	493,325
EXPENSES					
Basic Services					
Financial administration	11,000	11,000	11,220	11,220	11,444
Secretarial services and membership management	23,000	23,000	23,460	23,460	23,929
Steering and working group support	32,000	32,000	32,640	32,640	33,293
Strategy development and representation interests	11,000	11,000	11,220	11,220	11,444
Committees					
Steering Ctee meetings	4,907	5,669	5,500	6,000	6,000
Global Tape Forum Afera Expenses	174	-930	0	280	7,000
Marketing Ctee meetings	4,265	5,592	5,500	6,000	6,000
Board representation		5,625	3,000	3,000	3,000
Technical Ctee /Standardization Support (Lutz Consultancy	7,932	9,794	8,000	8,500	8,000

Afera

Association for the self-adhesive tape industry

	Actual	Actual	Budget	Projection	Budget
	2017	2018	2019	2019	2020
EXPENSES	Euro	Euro	Euro	Euro	Euro
Events					
Annual Conference	91,305	147,779	120,000	140,000	140,000
Secretarial fee	43,000	43,000	43,860	43,860	44,737
Tape College	39,030	0	45,000	48,355	0
Secretarial fee	27,500	0	28,050	28,050	0
Technical Seminar (Global Tape Summit 2018)	0	122,876	0	0	80,000
Secretarial fee	0	43,000	0	0	28,050
Media					
Communications/editing	8,568	25,932	24,000	24,000	24,000
Standardisation Costs (Test Methods)	4,260	4,260	5,000	4,260	4,260
Test manual rewrite	0	0	20,000	12,500	0
IT Expenses (web hosting and domain registration)	4,140	3,323	2,800	2,800	2,800
Secretarial fee (internal & external communication)	35,500	35,500	36,210	36,210	36,934
Environmental Activities					
Professional support regulatory affairs	2,625	2,443	12,000	3,500	35,000
Afera ESVOC participation/BREF revision	3,743	5,597	6,000	6,000	6,000
Secretarial fee	10,000	10,000	10,200	10,200	
Strategic Projects					
Project Future Workforce			10,000	0	10,000
Marketing Support	12,123	17,622	9,500	10,000	8,000
Secretarial fee	17,500	17,500	17,850	17,850	18,207
Financial costs					
Office Expenses	3,571	4,636	3,500	3,500	3,500
Certified Annual Account	5,000	3,000	4,000	4,000	4,000
Provision & Debt Collection	-962	0	PM	PM	PM
Bank Costs	1,672	2,877	2,340	3,000	3,000
TOTAL EXPENSES	402,853	592,095	500,850	500,405	558,599
RESULT	56,389	-12,322	-55,975	2,115	-65,274
Capital, 1 January	363,566	419,955	407,634	407,634	409,749
Capital, 31 December	419,955	407,634	351,659	409,749	344,474

Membership fees

- Our membership fees for Active, Associated and Affiliated Members will remain unchanged in 2020
- The membership fee for Converters will return to its normal level, €1.900 (as decided in the GA 2017)



9th Afera Technical Seminar
6 – 8 April 2020
Brussels Marriott Hotel -
Belgium



63rd Afera Annual Conference
7 – 9 October 2020
Swissotel The Bosphorus
Istanbul - Turkey

Steering Committee composition

Representing	Company	Candidates	Until
Tape Manufacturer	Lohmann	Evert Smit	9/2021
Tape Manufacturer	TBD	TBD	9/2022
Tape Manufacturer	tesa	Reinhard Storbeck (TC Chair)	9/2021
Tape Manufacturer	American Biltrite	Jacques Geijsen (MKC Chair)	9/2020
Tape Manufacturer	TBD	TBD	9/2022
Converter	Egebant	İbrahim Hatipoglu	9/2021
Supplier	Loparex	Ian Grace	9/2020
Supplier	H.B. Fuller	Melanie Ott	9/2020

Rotation Schedule:

Presidency	Years	Vice Presidency
Evert Smit	2018-2021	TBD



Afera

The European Adhesive Tape Association

**Official Opening
62nd Annual Conference**

