

# Afera MKC meeting

Tuesday, 28 September 2022/ 09:00 – 12:30

**Adonis room – Las Arenas Hotel, Valencia**

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# 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:**

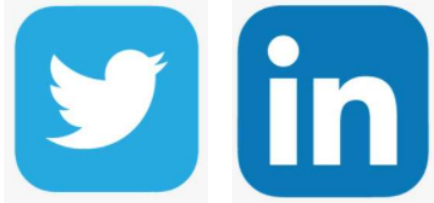
- ✗ **Allocation of markets or sources of supply**, whether geographic or by customer
- ✗ **Relationships with individual suppliers or customers**, in particular where this could lead to their disappearance from the market
- ✗ **"Blacklists" or boycotts of customers**, competitors or suppliers
- ✗ **Proposed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

- 1. Opening, agenda, competition law compliance**
  - 2. Approval minutes of 20 April 2022 Zoom MKC meeting**
  - 3. Short MARCOM Update (EV)**
  - 4. Repositioned Afera Marketing Committee Agenda**
    - 4.1 4 Blocker new MKC positioning (GS/RK)
    - 4.2 Results opinion survey (EV/BL)
      - Decide on topics, priorities, actions (shortlist)
      - Setting work streams and leads
    - 4.3 Content focus & Calendar 2023
      - Including conference programme 2023
  - 5. Other business**
  - 6. Next meeting – February 2023 - TBC**
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## 2/ Approval minutes of 20 April and 8 February 2022 Zoom MKC meetings

## 3/ Short MARCOM Update

# MarCom report



- Increase in followers on social media in 2022:
  - 5488 for design Twitter account (+73)
  - 457 for Afera on Twitter (+16)
  - 891 on LinkedIn (+158)

## #ThatSticks campaign

- Published medical story (58 reads so far – need to spread message more)
- 2nd story ready on household
- Delay in publication due to approval (PR) departments

- Last year recovered and increased website traffic
- 2022 figures same as in 2021
  - Users 0,36% increase
  - Pageviews 2,7% decrease
  - Sessions 0,23% increase
- Peak in April (due to tape college)

## 4/ Repositioned Afera Marketing Committee Agenda

- 4.1 4 Blocker new MKC positioning (GS/RK)
- 4.2 Results opinion survey (EV/BL)
  - Decide on topics, priorities, actions (shortlist)
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# AFERA Marketing Committee - 4 Blocker



## Mission

Amplify Afera Expertise / Resources / Networking Capabilities in order to be recognized as the undisputed European Tape Industry House of Answers.

Unleash the Afera Know how to generate traction and support continued new Membership Recruiting.

## How / Tactics

- Opinion Survey
  - New vs Historical Members Feedback
  - Collect Voice of Members
- Communication
  - Social Media
  - Digital Channel
  - “Where to Go” Guide to refresh/simplify Site Access and reinforce Members awareness
- Marketing Calendar (based on the “what”)
  - Ad hoc Campaign
  - Webinars
  - Lectures

## What / Areas of Focus

- Market Insights
  - Tape Industry Analytics (ie Freedonia / Exxon Market data)
  - European Industrial Association combined Data
- Technology Trends
  - Painting / AI / Closing
- Prioritized Verticals
  - Transportation / F&B / Other
- Association Prioritized Topics Deployment
  - Forthcoming Regulations
  - AFSP

## MKC Members expected contribution

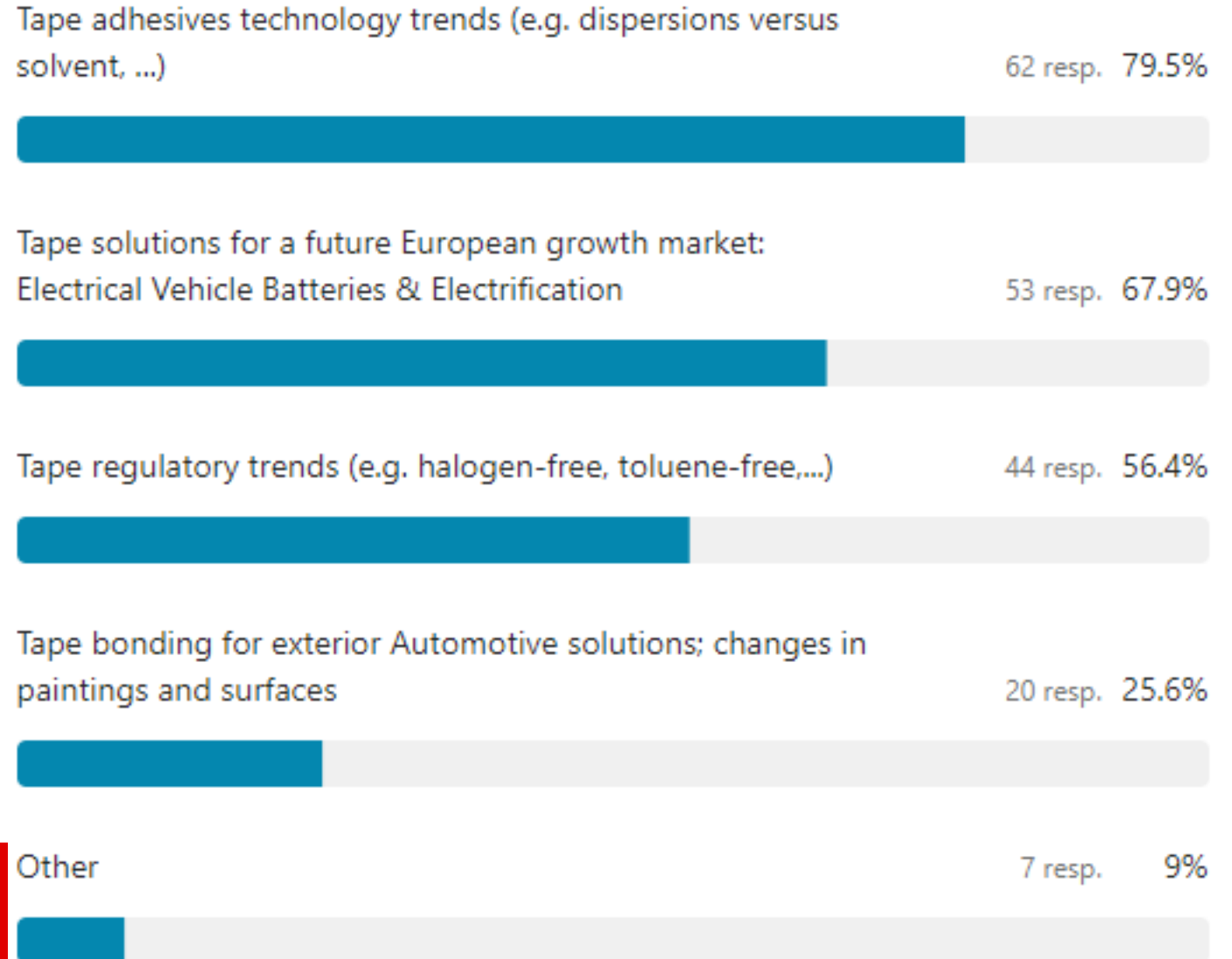
- Promote, suggest, validate priority markets
- Select the most relevant Technology Trend having a medium – long term impact for the Tape Industry
- Approve the Communication Plan
- Support the initiatives that will be part of the Marketing Calendar

# Results survey

## Technology and market trends

### Other:

- *Halogen free EV tapes*
- *General market growth and in tape types and region*
- *Regulation trend in recyclability/debonding*
- *RM Evolution for Sustainability tape solutions*
- *Sustainability*
- *Tape market evolution/trends*
- *Eco-design for adhesives, recycling, energy transition, ...*



# Results survey

## Sustainability

### Other:

- *Avoiding hazardous substances or difficult to recycle substances*
- *Renewable material tapes (reduce carbon footprint)*
- *Recycling of release liners of tapes*
- *Machine concepts to support sustainability topics (process demands for production lines)*
- *Debondable system*
- *Tape with renewable materials*
- *2x PCF calculation method harmonization (develop specific frame for Europe)*
- *Low carbon design*
- *Helping to set standards e.g. how to calculate carbon foot print*
- *Sustainability in all its aspects. Raw materials, converting, lifetime-use, end of lifetime, recyclability*
- *Regulation watch*
- *Recycling and circularity options*
- *Other technologies or concepts (mass reduction, mass-balance, traceability)*
- *Using renewable raw material*
- *Looking holistically at emissions' reduction, not just recyclability*

Ecological tape solutions for ideally 100% recyclability

59 resp. 75.6%



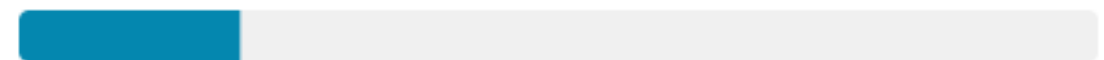
Recycled tape content materials - state of the art

54 resp. 69.2%



Other

16 resp. 20.5%



# Results survey

## Market data/analysis

Technology trends: growth potential, expected volumes 65 resp. 83.3%



Application trends: growth potential, expected volumes 63 resp. 80.8%



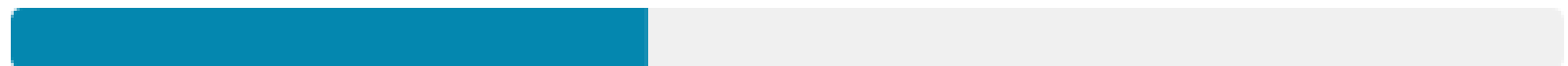
Consolidated tape industry market data 58 resp. 74.4%



Raw materials technology innovation 38 resp. 48.7%



Raw materials price indices trends 32 resp. 41%

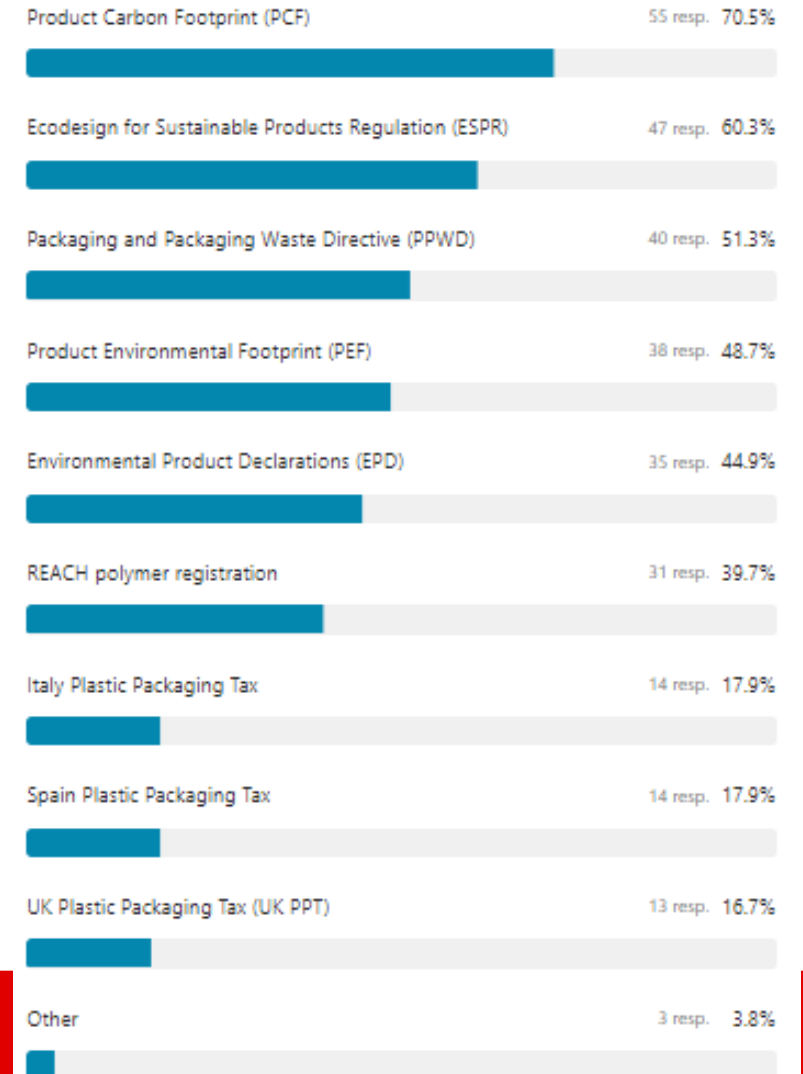


# Results survey

## Regulations/product declarations

### Other:

- *Green washing risk (using post-industrial waste instead of post consumer waste)*
- *ROHS*



# Results survey

## Other areas of interest

- Bio-degradable, bio-compostable solutions
- How to intensify the tape industry cooperation between members
- Solvent or UV adhesive tape recycling
- Market trends in Europe, USA and Asia
- Recycling of Tape Release Liners
- The main ones are included already, An update on regulations or industry headlines
- Product safety
- End-user's voices/feedback/demand
- Impact of energy and gas price developments on the competitiveness of European Tape Industry
- Newest technology and types of adhesives
- News and updates in international test methods for tapes
- EU regulations, market trends and data
- Purchase network
- Any environmental regulation that force tape producer to reduce the use of solvent?
- Lobbying e.g. with EU to avoid the perception of tapes as 'unsustainable bonding technology'
- Reversible adhesion
- New possibilities for tapes
- Innovative adhesives and coating process based on the use of lower energy
- Market figures actual and future expectations
- Energy crisis letter to the EU
- Test methods
- Sinergies with other industries associations
- Overview of market size and potential
- Recycling of tape waste. Recycling companies in specific countries who have technology to recycle tape or tape component waste
- Debonding on demand
- Biodegradable tape solutions
- Trending innovation and digitalization systems (lab notebooks, project management tools, data science/analysis on application data, agile methodology adaptation in chemical industry, biomimicry etc)
- Release liner
- Global view – what are the trends in US, Asia? How is the market looking there?
- Energy price increase impact on the European tape production compared to Asia/USA
- Biocompostability
- New tape technologies
- Relation with the EU as lobby partner for tape and tax regulations
- Consequences of the macroeconomic changes on the tape market
- Sustainability
- Innovations and future trends
- ESG currently applied in adhesive tape industry in Europe
- Ensuring that tape as bonding technology isn't demoted in the light of European recycling & repair initiatives
- Technical penetration of adhesive tape in the market as mechanical junctions

# Next steps in this meeting

- Decide which topics are in scope for MKC and which belong to other committee
  - How can we support the out of scope/other committees with their topics?
  - How can we structure/group the topics that are in scope (set up focus areas)?
- Do we set up focus areas/working groups within MKC or deal with focus areas with whole committee?
- Per focus area, decide on which topics are a priority and should be dealt with in 2023 (create shortlist)
- What actions/next steps are necessary to work on these prioritized topics
- (if time permits) Create content focus and calendar for 2023 – including conference programme 2023

# Next steps in this meeting

- Focus area:
- Name lead:
- Group members:
- Topics that are covered within this focus area:
- Priorities (shortlist):
- Actions 2023 (including timeline):



## 5/ Other business

- Possible presence at upcoming Adhesives & Bonding Expo Europe (8-10 November)
- Afera Test Method Manual

## 6/ Next meeting

February 2023 - TBC

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For the conference session tomorrow:

[https://drive.google.com/drive/folders/1VXjkg62nXx9vnb4uU0x\\_8axY-LmhTMd4](https://drive.google.com/drive/folders/1VXjkg62nXx9vnb4uU0x_8axY-LmhTMd4)