

Afera Marketing Committee (MKC) Meeting Minutes

Date: 8 February 2023

Time: 9.00 – 12.00

Venue: Leonardo Royal Düsseldorf
Königsallee in Düsseldorf, Germany

Actions:

- Annual Conference Programme WG > see whether you can organise Malta Conference presentations on a comparative LCA and the benefits of tape, linked to the PPWR PR-WG (IG, JB, AB, SH, CM, RK and Dídac Puy Oliva) > support EV in developing a plan for “general tape image action campaign”, meeting on 24 March
- EV > roll out new version of Afera’s website
- All MKC Members > evaluate new version of website and decide whether to pursue further rebranding process
- EV > use video shots from our last event in Valencia on the homepage
- AL > make sure Afera is more active in speaking to our Affiliated Members, such as Assogomma, updating them on our activities
- EV > use the latest Survey outcome to schedule in most sought-after applications within #ThatSticks Campaign content calendar
- All Members present > make sure to follow the [Afera Member LinkedIn account](#), like and re-post items (e.g. Technical Seminar) when possible

Present:	1. RK	Rupert Kichler (MKC Chairman, Avery Dennison Performance Tapes)
	2. GS	Giovanni Scognamiglio (MKC Vice-Chairman, 3M Europe, Italy), <i>online</i>
	3. KU	Kerstin Unverhau, 3M Europe
	4. GJvR	Gert-Jan van Ruler (DRT - Les Dérivés Résiniques et Terpéniques)
	5. JB	Jeff Burrington (H.B. Fuller U.K., Ltd., TC guest)
	6. AB	Anita Barni (ICAP-SIRA Chemicals and Polymers SpA)
	7. ES	Evert Smit (Afera President, Lohmann GmbH & Co KG)
	8. SH	Sonja Haug (Loparex B.V.)
	9. MG	Marco Galiazzo (NAR SpA)
	10. CM	Cesare Muraro (NAR SpA)
	11. SM	Stefan Meirsmann (Nitto Europe N.V.)
	12. YS	Yasemin Seyren (Organik Kimya SAN. Ve TIC. A.Ş.)
	13. KS	Kristin Schöne (Synthomer)
	14. IG	Ian Grace (Afera Steering Committee Member, TC guest)
	15. AL	Astrid Lejeune (Afera Secretary-General, Lejeune Association Management)
	16. EV	Elke Verbaarschot (Afera Marketing Communications Mgr.)

- 17. **BF** Bathsheba Fulton (Afera Editorial Communications)
- 18. **BvL** Bert van Loon (Afera Marketing Strategist)
- 19. **PE** Pablo Englebienne (Afera Sustainability and Regulatory Affairs Manager)

- Excused:
- 1. **CM** Cheryl Marsh (Advance Tapes International, Ltd.)
 - 2. **AV** Aris Venetis (Atlas Tapes SA)
 - 3. **IM** Izzat Midani (Dow Europe GmbH)
 - 4. **FH** Florian Heller (Mondi Group)
 - 5. **SN** Stefan Neuner (Neevah Performance Materials)
 - 6. **WA** Wolfgang Aufmuth (Seksui Alveo)
 - 7. **KK** Karsten Krahwinkel (tesa SE)

Chairman: R. Kichler
 Secretary: A. Lejeune
 Dates of Next Meetings: A physical meeting will take place on **Wednesday, 4 October 2023 (9.00-12.30)** at the Westin Dragonara Resort in St. Julian's, Malta, followed by lunch in the Hotel. This will precede the Working Programme of the 66th Annual Conference, which begins the next morning.

Content

*** Note:**

- Refer to the **Afera MKC Presentation 8 February 2023** co-ordinating with these Minutes
- **Red, highlighted** names denote expected actions.

MKC Working Groups	
<p>Content Generation & Engagement (CGE-WG) > Conference Programme Also a TC WG</p>	<p>Giovanni Scognamiglio, 3M Italy Rupert Kichler, Avery Dennison Astrid Lejeune, Afera Bert van Loon, Afera Gert-Jan van Ruler, DRT Evert Smit, Lohmann Cesare Muraro, NAR Anne-Marie Klink, TC Vice-Chair, 3M Europe Jean-Loup Masson, SC, TC, Novacel</p>
<p>Marketing Communications (MarCom-WG)</p>	<p>Elke Verbaarschot, Leader, Afera Bathsheba Fulton, Afera Bert van Loon, Afera</p>

	<i>MKC Members consulted as needed</i>
Membership Recruitment (Mem-WG)	Stefan Meirsmann, Nitto, Leader Astrid Lejeune, Afera Bathsheba Fulton, Afera Joanna Oleskow, Advance Tapes Stefan Neuner, Neenah
AFSP Workstream Members (of Members and Member Companies represented on MKC)	Rupert Kichler, Avery Dennison, WS1 Quin Dams, Avery Dennison, WS2 Anne Verhaert, Avery Dennison, WS3 Giovanni Scognamiglio, 3M Europe, WS2 Anne-Marie Klink, TC Vice-Chair, 3M Europe, WS1 Danny Beekman, TC, DRT, WS1 Martijn Verhagen, TC, Lohmann, WS1 Florian Heller, Mondi, WS2 Michel Sabo, TC, Nitto Belgium, WS2 Satish Palika, TC, Seksui Alveo, WS1 Reinhard Storbeck, TC Chair, SC, tesa, WS1,2,3 Andreas Wieck, tesa, WS2
Tape Image/Awareness Campaign (PR-WG)	Elke Verbaarschot, Leader, Afera Bathsheba Fulton, Afera Rupert Kichler, Avery Dennison Anita Barni, ICAP-SIRA Sonja Haug, Loparex Cesare Muraro, NAR Dídac Puy Oliva (Nitto) Ian Grace (SC, TC, Independent) Jeff Burrington (TC, H.B. Fuller)

1. Opening, competition law compliance

- A. Opening, agenda > RK welcomed all present and held a round of introductions. In addition to Members visiting from the Technical Committee, Kristin Schöne (market development manager at Synthomer), Cesare Muraro (sales department at NAR SpA), Marco Galiazzo (technician at NAR SpA) and Sonja Haug (global sustainability manager at Loparex B.V.) were officially introduced to the MKC. AL noted that more than half of the attendees have technical backgrounds, which could be very useful to the MKC.
- B. Afera's Competition Law Compliance Policy was reviewed and confirmed by all present.

2. Approval of Minutes of 28 September 2022 MKC Meeting in Valencia

- A. The Minutes of the Afera MKC Meeting held on 28 September 2022 in Valencia, Spain, were approved and signed as a true record of proceedings.

3. Results of MarCom Objectives Trend Survey 2023

- A. EV reviewed the findings of the follow-up Member Survey held in January and February 2023 zeroing in on the breakdown of the preferred internal focus of **adhesive tape technology and application trends** (see slides 6-14), of which there were 74 responses (Member classes unknown):

- a. **Foremost trends** affecting the tape business:
1. 29% > working towards a circular economy
 2. 18% > demand for debonding (end-of-life, repairability)
 3. 17% > dealing with tape waste (a complex mixture of non-separate plastics)
 4. 16% > developing functionalised tapes
 5. 13% > demand for tape-parts recycling (release liner).
- b. **How can Afera Members contribute/collaborate** in building confidence for adhesive bonding solutions versus alternatives?
1. 61% > general (tape) image campaign
 2. 26% > sharing information within tape industry
 3. 22% > intensify collaboration.
- c. **Greatest threat** within the tape business:
1. 29% > regulations
 2. 22% > supply chain disruptions
 3. 19% > costs (production, energy, prices, labour, etc.)
 4. 13% > alternative technologies.
- d. **Gaps in today's market** for tape solutions or underused applications from a performance pov:
1. Debonding solutions
 2. Building & construction
 3. More sustainable solutions.
- e. Would you like to see **more sessions on developing functionalised tapes and monitoring trends in this area?**
1. 89% > yes
 2. Which technologies?
 - i. 13x > fireproofing tapes
 - ii. 9x > medical tapes
 - iii. 7x > automotive tapes
 - iv. 6x > electronic tapes
 - v. 5x > all areas
 - vi. 4x > smart tapes
 - vii. 4x > new technologies and market developments/figures and needs
 - viii. 4x > recycling/debonding.

b. Relevant **white spaces for tapes**: (answers were varied as the questions was not well-interpreted)

1. **Debonding on demand**
2. Medical sector
3. Sustainability and recycling.

c. **Future topics** you would like to see more on:

1. **26% > raw materials evolution for sustainable tapes solutions**
2. 19% > sustainability/Ecodesign for adhesives, recycling and energy transportation
3. 17% > ecological tape solutions for ideally 100% recyclability
4. 16% > general market growth by tape type and region
5. 13% > state-of-the-art in recycled tape content materials
6. 8% > intelligence gathering.

B. Conclusions and next steps > The technically oriented attendees commented that mention of regulatory issues and substitution of raw materials overlaps with Technical Committee issues.

a. The Annual Conference Programme WG could organise presentations:

1. Comparing tape and a bonding technology with other solutions for the same application, a comparative LCA
2. Listing all the benefits of tape, because some in our industry do not know all of them or forget them; connect this to the PPWR.

b. A MKC Working Group including IG, JB, AB, SH, CM, RK and Dídac Puy Oliva (marketing specialist at Nitto Europe N.V.) will be set up to support EV in developing a plan for a "general tape image action campaign." The indicated solution: **Content on positive tape solutions for B2B use by Afera Members and for increasing outside interest (from a defined user audience) in and awareness of tapes at afera.com and on our social media channels.** A first meeting of the PR-WG online is scheduled for Friday, 24 March, at 11h.

c. The campaign could touch on the following input from Members:

- i. Both the specialty and commodity tape markets
- ii. What are bonding solutions for designers, engineers and product developers?
- iii. Why do you have a certain negative perception or idea about tape?
- iv. Attractive application examples
- v. Success stories
- vi. Highlight benefits/circular solutions/recyclability
- vii. Understand needs of different markets
- viii. Comparison (performance) tape solutions versus other assembly methods
- ix. Practical examples of everyday products
- x. Imagine a world without tape solutions (a smartphone with screws?!).

- d. Further campaign actions summarised by the MKC:
- i. The audience who will use the content is Afera Members; the content is to serve their tape awareness needs among their customers
 - ii. Highlight the variety of applications solutions, emphasising that tapes are everywhere
 - iii. Provide much more awareness about what tapes can provide
 - iv. Reverse the lack of information about and trust in tape products (create an “ah-ha” effect for building trust with application examples)
 - v. Add in the topic of “sustainability and tapes”, reassuring potential users about the sustainable aspect of tapes
 - vi. The broader we go, the more abstract it will become
 - vii. Make it charming but clear, appealing to emotions
 - viii. Include a call to action
 - ix. Post it on Afera’s homepage if applicable
 - x. The material in afera.com’s “[About tape](#)” section is already a good briefing for an agency. The briefing about specialty tapes should be very detailed and longer than what already exists in “[Why tape?](#)”, including that tapes are trusted, versatile, valuable, functional (beyond bonding), lightweight and future-proof.

4. MarCom update

A. Proposal to work on Afera’s brand strategy (see slides 16-23 for content) – EV >

- a. Decision following discussion: EV will work on rolling out a new version of Afera’s website—a free update from the maker—and reposition material and content to refresh its look/house style. For the homepage, EV can also use video shots from our last event in Valencia. The MKC will first evaluate the new version and then decide whether to pursue a further rebranding process, evaluating the options presented in the slides more carefully with a budget proposal to the Steering Committee. It was noted that Afera is celebrating its 65th birthday this year, so any updating of its identity could be linked to this.
- b. Afera will also be more active in speaking to our Affiliated Members, such as Assogomma, updating them on our activities (AL).

B. Statistics re: afera.com and social media channels (see slide 24) - EV >

- a. Afera’s Design that Sticks Twitter account has 5,410 followers, who have decreased since September. The Afera Adhesive Tape Twitter account, which is aimed at our industry association Members, has increased to 473 (+32). The Afera Member LinkedIn account has reached a new high of 1,017 (+284) followers. AL asked all the Members present to follow this, like and re-post items (e.g. Technical Seminar) when possible.

- b. afera.com traffic was the same in 2022 as it was in 2021 (+0.36% users, -2.7% pageviews and +0.23% sessions). April saw a marked peak probably due to Tape College traffic.
- c. #ThatSticks Campaign > In order to reach out to a wider audience than the tape industry, EV has been running a project in which she shares Member stories of (unusual) applications to illustrate the wide range of possibilities and capabilities in the world of tape to Industry outsiders. **EV still needs more input and plans to use the latest Survey outcome to schedule in the most sought-after applications within the content calendar.**

5. 66th Afera Conference in St. Julian's, Malta, 2023

- A. Theme - AL > Decision: a rendition of "Future-Proofing the Industry". RK thought it was important to mention that the last Conference was considered the best ever, because everyone who felt insecure could share ideas with like-minded Industry colleagues. A breakout session should be repeated.
 - a. Topics for presentations should include
 - i. Insecurity (regulations, supply chains, energy)
 - ii. Packaging materials, PPWR, commodity/"all tapes are functional tapes", Southern Europe focus
 - iii. Converters
 - iv. Energy/efficiency (due to Ukraine crisis, sustainability)
 - v. Building & construction industry (Construct Europe), European Green Deal – B&C mentioned most often as a "white space" in Member Survey
 - vi. The traditional market analysis/market figures (AWA and Freedonia).
- B. Programme Working Group Composition - AL > GJvR and CM will join the existing WG consisting of Anne-Marie Klink (3M), Jean-Loup Masson (Novacel), ES, RK, GS, BvL and AL. BvL scheduled an online Meeting with the WG, discussing the shortlist of ideas in agenda item 5A on 24 February at 11.00.

6. Marketing Calendar 2023

- A. Due to time constraints, this item was not discussed as it was viewed as a summarising of decisions taken in above agenda items.

7. Other business

- C. ES brought up communication to Members about Afera's forthcoming PCF calculation tool. No decision was taken on this topic.

8. Next Meeting

- A. A physical meeting will take place on **Wednesday, 4 October 2023 (9.00-12.30)** at the Westin Dragonara Resort in St. Julian's, Malta, followed by lunch in the Hotel. This will precede the Working Programme of the 66th Annual Conference, which begins the next morning.

Astrid Lejeune
The Hague, 21 March 2023

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.
