



Afera

The European Adhesive Tape Association

General Assembly

18 November 2020, 14.00 CET

VIRTUAL





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 of Minutes of GA Lisbon 2019**
- 3. General Report 2020 / Going Forward**
 - 3.1 Report of the Marketing Committee
 - 3.2 Report of the Technical Committee
 - 3.3 Report of the Steering Committee
- 4. Financial report**
 - 4.1 Balance sheet 2019
 - 4.2 Latest 2020
- 5. Approval of Budget 2021**
- 6. Membership fees 2021**
- 7. Composition of Steering Committee**
- 8. Next Conference date and venue for 2021 (if possible in person)**
- 9. Any other business**
- 10. Closing by Afera President**

2. Approval of Minutes of GA Lisbon 2019



Proposal to adopt the Minutes of the previous General Assembly Lisbon, 10 October 2019




The European Adhesive Tape Association

Afera General Assembly (GA)
Minutes of the Meeting of 10 October 2019
Pestana Palace Hotel, Lisbon, Portugal
Conference Room Belem, 09.00-09.40

1. Opening by Afera President Evert Smit

- Held in Lisbon, Portugal, the 62nd General Assembly of Afera was attended by 62.5% of the Active Membership.
- Afera President Evert Smit (head of R&D of technical products at Lohmann GmbH & Co KG) called the GA to order, first thanking Afera's sponsors:



- He then reviewed the Agenda (slide 5) and explained [Afera's strengthened Competition Law Compliance Policy](#) (slides 3-4), which was read and confirmed by all present. Anyone in disagreement would have been asked to leave the Meeting.
- Mr. Smit said Afera had drawn together one of the largest audiences for the GA and Annual Conference in many years, and he saw quite a few young and new faces in the crowd. Afera's primary aim is making the tape business future-proof, and this is not an easy thing to do. "You cannot just assume that tapes will always be used for bonding. Many technologies that were great in their time have disappeared very quickly. We need to make sure we know what is going to happen in the future and that we are a part of it."

2. Approval of the Minutes of the Athens 2018 GA

- The GA 2018 Minutes, which had been emailed to all Members previously, were approved without any remarks.

3. Afera's Strategy 2020-2025 Update

- Mr. Smit explained that we are the adhesive tape network, representing the entire European adhesive tape industry value chain.

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 General Assembly Minutes, 10 October 2019, Lisbon 1

Afera's strategy 2020-2025

- The European adhesive tape network
- Networking, supportive, educational webinars, meetings, conferences and seminars
- Sustainability and circularity
- Environmental regulation
- Market information and trends
- Technical standards
- Organisations in adjacent technologies

Afera's strategy 2020-2025

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Committee structure @beginning of 2020



3.1 Afera Marketing Committee (MKC) General Report 2020

By Chairman Jacques Geijsen



Current MKC WGs action realignment

Steering Committee
(SC)

Marketing Committee
(MKC)

- Focus in 2021 on aligning MKC's responsibilities with Afera's future-proof strategy

MarCom

>Afera Team

Membership
Recruitment

>Afera Team

Content Generation
& Engagement

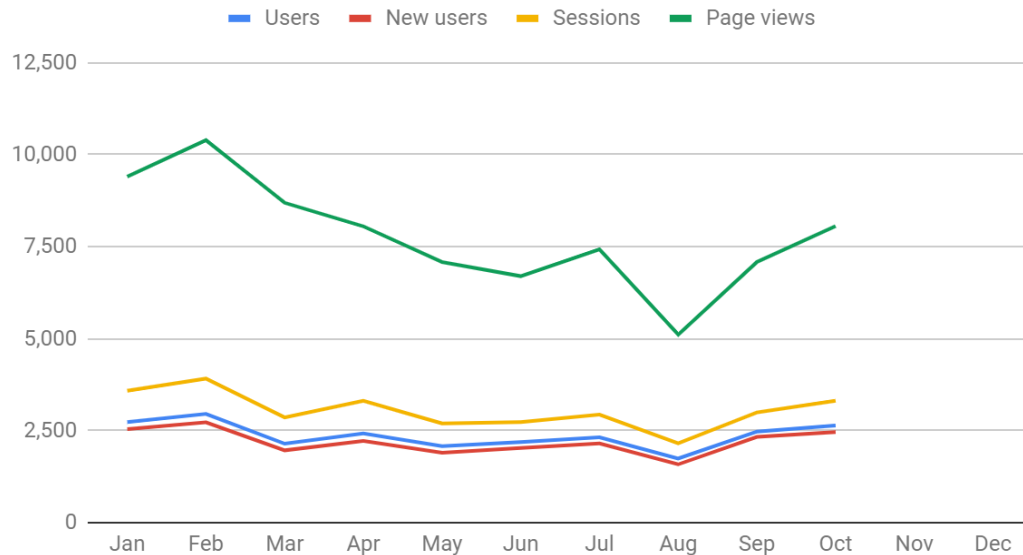
>Higher-quality
content

Sustainability

>Marketing
aspects, product
stewardship

MarCom: afera.com

Afera website statistics



- Working on building and fine-tuning Afera's identity
- New website design launched in February
- Figures back up to 'normal level'
- Dip in website visitors, probably due to COVID crisis (although June figures similar to 2019 same period)
- COVID pages/Webinars and Test Methods most visited during Spring 2020.

Afera Member Company descriptions

Scapa Group plc

Contact: Martha Sloboda
Manchester Road
OL7 0ED ASHTON UNDER LYNE
+1 717 818 1177

<http://www.scapaindustrial.com>



Scapa Industrial is a division of Scapa Group, supplying America and Asia. Our Engineered Products business and Specialty Products markets. In these sectors, demand. Our Commercial Products business includes the Commercial environments with shorter lead times within a demanding market. adapt to address the evolving nature and complexity of

Specialties: Bonding Solutions and Adhesive Components, Tapes, Quality, Specialist Adhesive Technologies, High Performance Solutions, Technical Support, and Adhesive Tapes, Foams

www.barnierpro.com
www.renfrewpro.com

Voronet, S.L.

Contact: Eduard Papell
Santa Anna, 101 - Nav A
E-08290 CERDANYOLA (BARCELONA)
+34 935 947 580
<http://www.voronet.es>



VORONET is a supplier and converter of specialty products always tailored to the needs of our customers.

Our main goal is to provide optimal and tailored solutions for any specific application that is defined—one that encompasses the best cost, right quality and suitable presentation for final application. Therefore VORONET chooses the best products out of a wide range of possibilities, or develops and creates new specific products for those occasions where required.

Our machinery park is constantly evolving and composed of state-of-the-art equipment, including the most modern production techniques adapted to our products and to the demands of our customers:

- Slitting machines with precision slitting as from 2mm width
- Rotational die cutting machines
- Flatbed die cutting machines
- Spool winding machines with tension control
- Laser cutting machine
- Rewinder and slitting machines
- Flat lamination station, 1000mm width
- Rotational lamination station.

“Member of Afera” logo-link

Follow us:

ubis Adhesive Tapes
Since 1970

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

HOME COMPANY PRODUCTS NEWS CONTACT

Adhesive tapes for all applicati

certoplast

COMPANY

- History
- Production Sites
- Management
- Quality
- Environment
- Associations

CERTOPLAST IS A MEMBER OF THE ASSOCIATIONS:

Industrieverband Klebstoffe e.V.
Innovationen erleben

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

ichemco

Coronavirus update

ICHEMCO was established in 1979 with the aim of offering specialty products designed for well-defined industry segments in conjunction with excellent service.

Having started with a wide range of products for pressure sensitive applications, our catalogue has been broadened to include products for adhesive, textile and leather finishing.

Our main target remains the PSA industry. For this, we grant complete know-how and technical service for virtually any end product, whether made using waterborne, solvent based, hot-melt or solvent-less UV curing technology.

Currently ICHEMCO develops, produces and markets all over the world:

Ready-to-coat Pressure Sensitive Adhesives (for Tapes, Labels, Lamination, Foams, Medical, all other applications)

- Waterborne acrylic adhesives
- SBR adhesives
- Solvent based acrylic adhesives
- Natural rubber adhesives
- Hot melt and solvent-less UV curable adhesives
- Dow silicone adhesives

Speciality chemicals

- Release agents for tapes, in solvent, waterborne or 100% solids
- High-performance antioxidant and UV protectors
- Isocyanate cross-linkers and other curing agents
- Primers
- Color pigments and masterbatches for adhesives

Products for the Printing of PSA tapes

- Special inks
- Release coatings, primers, additives, diluents, thickeners

Consultancy Services and Laboratory Testing Equipment

Through our partner company IchTAC, we represent Cheminstruments in many European, Middle East and African countries.

- Machines for testing the quality of PSA products: peel adhesion, shear, tack and other

CERTIFIED QUALITY MANAGEMENT SYSTEM
COQY
CERTIQUALITY
UNI EN ISO 9001:2015

CERTIFIED ENVIRONMENTAL MANAGEMENT SYSTEM
COQY
CERTIQUALITY
UNI EN ISO 14001:2015

CERTIFIED SAFETY MANAGEMENT SYSTEM
COQY
CERTIQUALITY
UNI ISO 45001:2018

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



Social media 2020

Design that Sticks

Scanning the web for Next Product Design

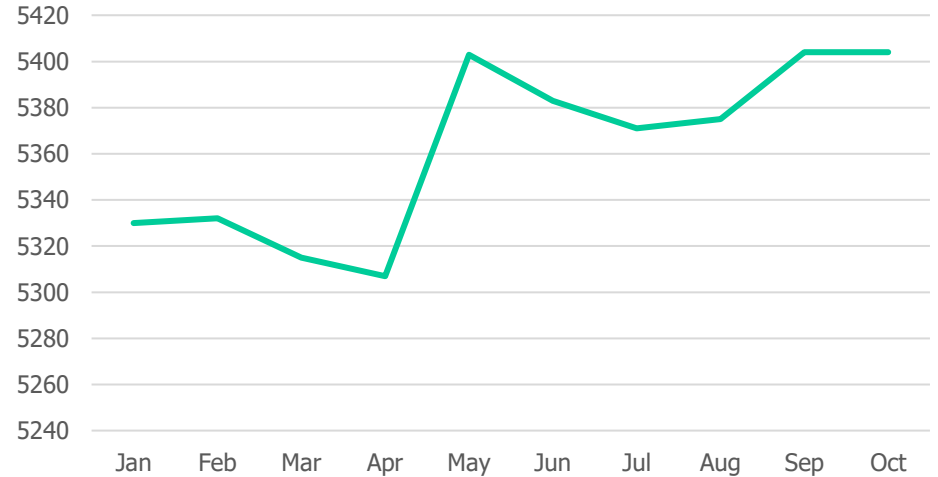


Current # followers	5398
Current # following	5333
Tweet impressions	86K

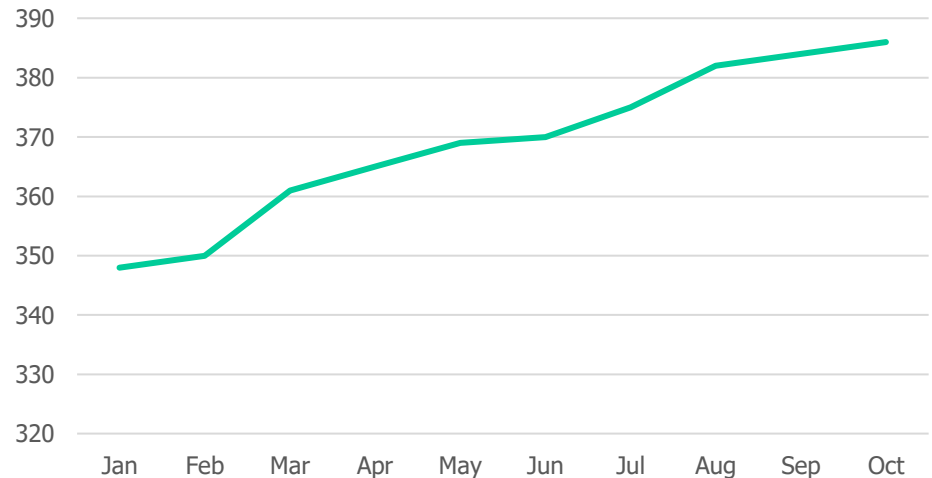


Current # followers	386
Current # following	870
Tweet impressions	59K

Twitter (design) followers (end of month)



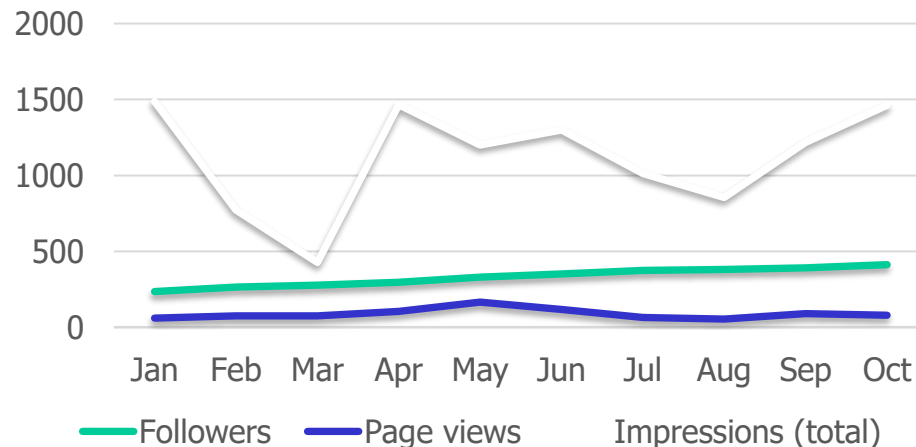
Twitter (member) followers (end of month)



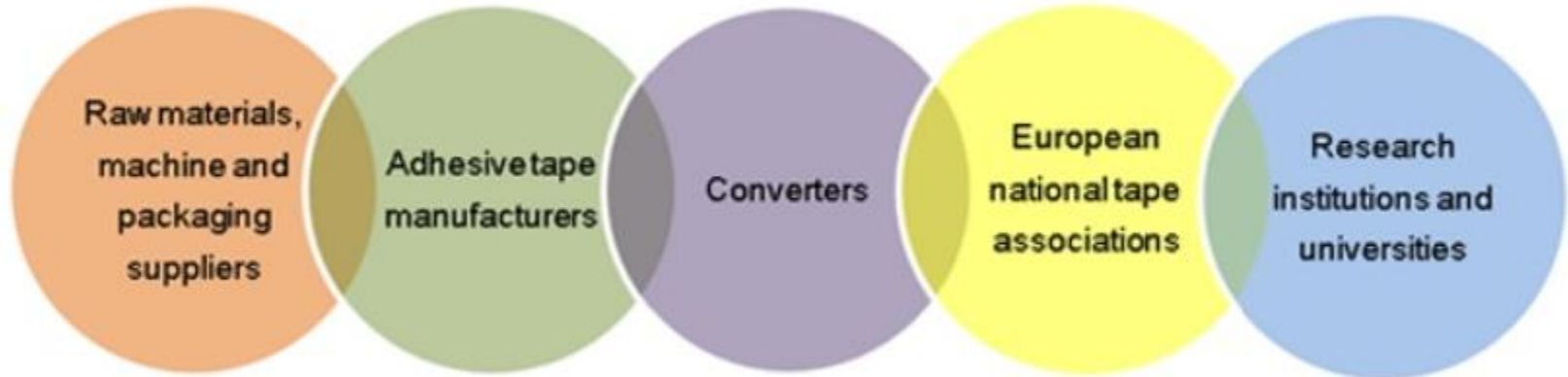
LinkedIn Account

- From 223 to 413 followers in 2020
- 48 posts
- Total impressions over 11K
- 408 clicks to Afera website
- Most activity is reported from the positions of business development and media & communications
- 2021 focus on engagement/building online community

LinkedIn Analytics 2020



Membership Recruitment



- Objective: Afera represents the value chain of tape manufacturing in Europe (market share)
- Mem-WG led by Stefan Meirsman has identified a short list of key tape producers and raw materials suppliers for recruitment, supported by Afera Team

Content Generation & Engagement

- Focus on high-quality content and other means to trigger interaction between Members and with the European adhesive tape industry

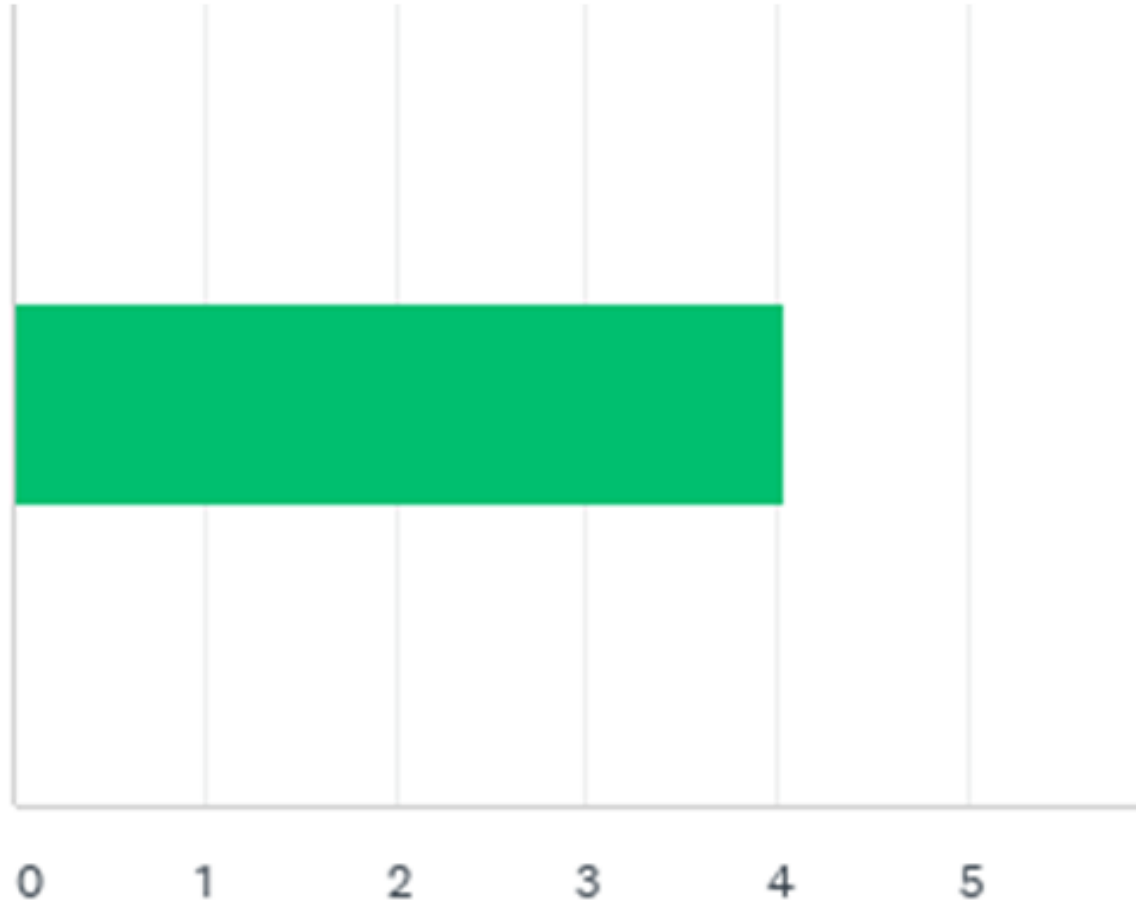
Channel	Technical	Marketing
Website	**	***
Social Media		***
Annual Conference	**	***

> Annual Conference 2020

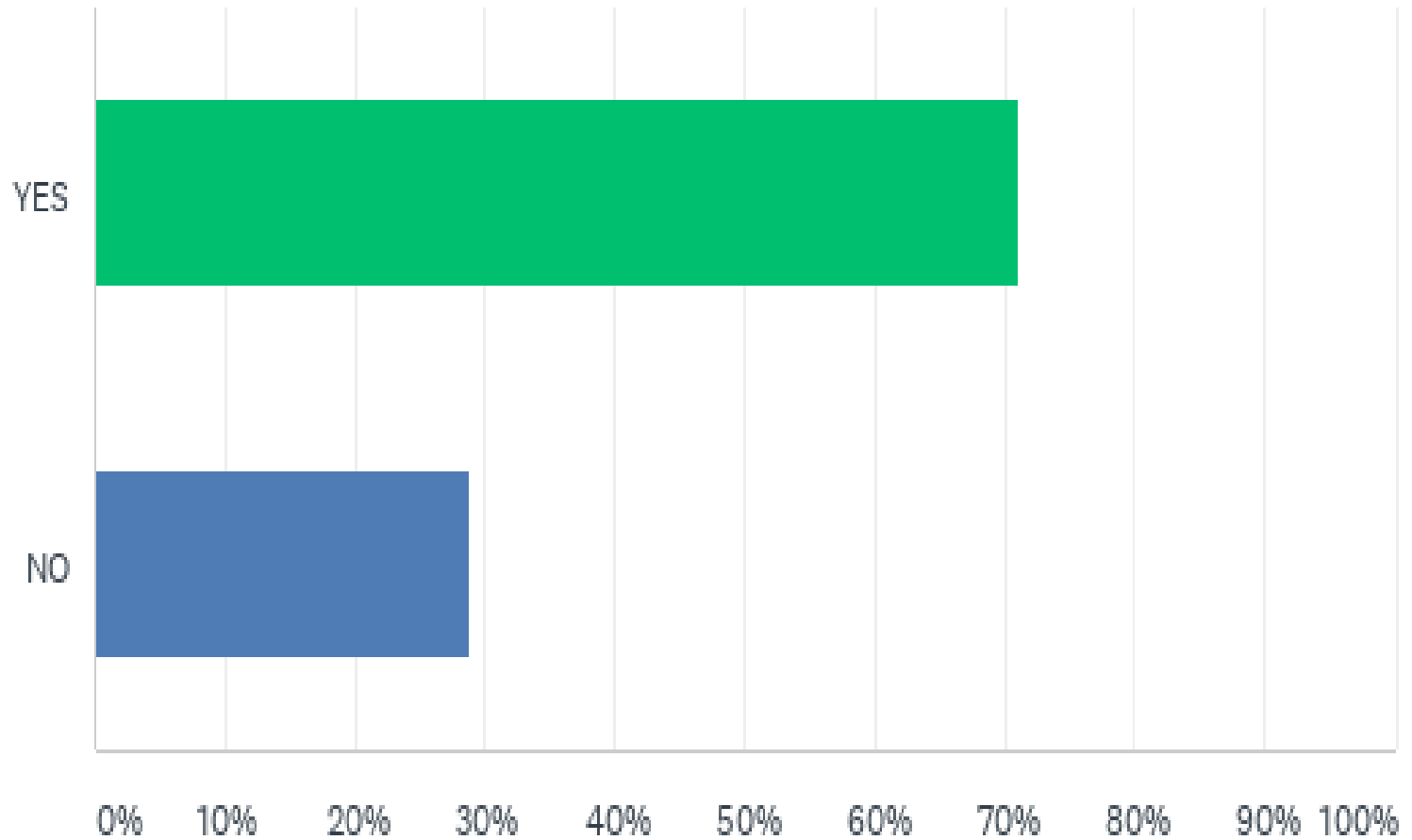
- Afera's most valued event, honouring the importance of face-to-face interaction
- But embracing this current opportunity to build out a strong, theme-driven online series on sustainability and circularity
- Spread out over a longer time period, and allowing all Member Company employees free registration, the supportive content can be processed better, and colleagues can prepare for and focus in on certain sessions
- Current Member survey has yielded positive results



How do you feel about Afera's currently running online Annual Conference series? (Please rate on a scale from 1 to 5 - 5 being most positive).



Do you feel that the theme and content of Afera's online Conference sessions could appeal to a wider audience within your company and partner organisations?



2020

Afera Annual Online Conference



Online programme

15 OCT | Context & Regulation

29 OCT | Measurement Methods and Challenges

12 NOV | Materials, Technologies, Products

26 NOV | Supply Chain Sustainability

10 DEC | The Organizational Challenge

14 JAN | Building the Business Case for Sustainability

2020

Afera Annual Online Conference



SUSTAINABILITY

6 SESSIONS

1 THEME

6 TOPICS

1 CHALLENGE

Online programme

15 OCT | Context & Regulation

29 OCT | Measurement Methods and Challenges

12 NOV | Materials, Technologies, Products

26 NOV | Supply Chain Sustainability

10 DEC | The Organizational Challenge

14 JAN | Building the Business Case for Sustainability

Involve colleagues
It's free for members

5

Sustainability and beyond

- Member Sustainability Survey in 2020
- Greater focus on marketing aspects/emphasising importance of business success in areas of sustainability, circularity, regulatory affairs and product stewardship



3.2 Afera Technical Committee (TC) General Report 2020 By Chairman Reinhard Storbeck



Current TC WGs action alignment

Steering Committee
(SC)

Technical Committee
(TC)

Regulatory
Affairs

>New RA Manager,
knowledge and
engagement

Sustainability

>Defining activity

Next-Level Test
Methods

>Dynamic Shear TM
survey, vision for future
TMs

Technical
Events

>9th Afera Technical
Seminar virtual

Content Generation &
Engagement

>High-quality
communications and
events input

New Regulatory Affairs Manager Pablo Englebienne

- Education
- A bumpy start...
- His new challenge

Incoming Afera Regulatory Affairs Manager hits the ground running

Pablo Englebienne talks joining Lejeune on the first day of lockdown, important regulatory trends and more



It hasn't been the most straightforward job transition for Belgian-Argentine doctor of chemistry Pablo Englebienne, who became Afera's new Regulatory Affairs Manager at Lejeune Association Management on 16 March. Mr. Englebienne, who earned his PhD in chemistry from McGill University in Montreal, Canada, in 2009, is Afera's newest management team member, having been recruited late last year to step up activity under the Association's latest strategy for regulation and political positioning:

- To team up with associations in adjacent technologies
- To increase relevant direct or indirect influence with regulatory bodies, and
- To raise knowledge and awareness of regulatory legislative developments and other public affairs issues among our Member Companies.

"The period during which I started at Lejeune has certainly been special: My first workday was the day that the Netherlands went into lockdown," Mr. Englebienne explained. "The onboarding was different, but in the meantime we all have gotten very comfortable with using online tools."

His new challenge

A chemistry specialist with a deep understanding of requirements for chemicals regulatory compliance, Mr. Englebienne will monitor all chemical and tape-related regulations pertaining to the European tape industry in close co-operation with European authorities, liaising and negotiating with regulatory stakeholders where possible and necessary.

Regulatory Affairs

getting you the info, support and industry representation you need

Areas for focus and stepping up action:

- Circular Economy Action Plan, E.U. Plastics Strategy and Ecodesign Directive
- Environmental product declarations (EPDs)
- Waste Framework Directive (WFD) and Packaging and Packaging Waste Directive (PPWD) legislative updates
- Plastic-based own resource (“plastic tax”)
- Sustainable Products Initiative
- SCIP database notification: 5 January 2021 deadline delay proposal
- Restriction of diisocyanates under REACH
- REACH for polymers
- Ethanol reproductive toxicity Cat. 2 harmonised classification intention
- Update of Food Contact Materials Regulation
- Chemical Strategy for Sustainability

Regulatory Affairs

Working Group includes delegates from Afera Member Companies:

- Advance Tapes
- H.B. Fuller UK
- IVK
- Lohmann
- Nitto Belgium
- tesa SE



Sustainability

promoting adhesive tapes as sustainable

Afera Sustainability Working Group mission:

To facilitate the promotion of adhesive tapes as sustainable solutions, i.e. to raise awareness of tapes improving recyclability, reducing weight, economising in materials use, etc.

The WG guides Afera Members' understanding of sustainability by providing tools such as framework presentations, standardised life cycle analyses, relevant political and legal information, and support in government and NGO relations.

Afera strives to represent the European adhesive tape industry on sustainability and other environmental, social, regulatory and technical issues, actively approaching adverse policy development with counter-evidence and focused positioning.

Sustainability

Working Group includes delegates from Afera Member Companies:

- A&G Ambalaj
- Dow
- DRT
- Eastman
- H.B. Fuller
- IVK
- Lohmann
- Loparex
- Nitto
- Organik Kimya



Sustainability

projects

- Monitoring upcoming legislation and preparing Industry statement on European Green Deal
- Determining calculation methods
- Expanding “sustainability” section at [afera.com](https://www.fera.com)
- Collaborating with and learning from other organisations
- Creating awareness and providing guidance to Afera Members

Next-level test methods

- Developing Member survey on a Dynamic Shear Test Method to establish if there is broad acceptance for developing this
- CEN activity re: updating Afera TMs, Lutz Jacob (Convenor CEN TC 193 / WG 7)
- 7th edition of Global Tape Forum Meetings will not take place as scheduled in 2020 or 2021 > Afera is working on setting up a digital meeting in early 2021 > to establish if 5 members will boldly take TMs to the next level and/or if Afera will take the lead in this

Next-level test methods

- Already adopted by the GTF and published on Afera's website:

Global Tape Forum (International) Harmonised Test Methods - Afera Test Methods

GTF 6001 (Afera 5013)	Shear Adhesion Failure Temperature (SAFT) of Pressure Sensitive Tape
GTF 6002 (Afera 5006)	Measurement of Thickness EN 1942 2003
GTF 6003	Guide for Width and Length of Adhesive Tape
GTF 6004* (Afera 5001)	Measurement of Peel Adhesive from Stainless Steel or from its Own Backing ISO 29862 - EN 1939
GTF 6005* (Afera 5004)	Breaking Strength and Elongation of Adhesive Tape ISO 29864 - EN 14410 2003
GTF 6006* (Afera 5012)	Static Shear Adhesion of Adhesive Tape ISO 29863 - EN 1943 2002
GTF 6007 (Afera 5014)	Loop Tack of Adhesive Tape

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

Next-level test methods

- Evaluation, training and implementation of rheological test methods
- Target: to accelerate the speed of development of new adhesives and to develop more precise statements about tape application properties

Next-level test methods

- *Afera Test Methods Manual*, 2020 ed.



- Free to Members and newly edited, the *Manual* just requires the addition of new photo illustrations, which currently cannot be completed because of COVID measures
- Afera will release an unillustrated version later this month and an illustrated one hopefully at the beginning of 2021

Technical events

- 9th Afera Technical Seminar 2021
 - Hosted as a virtual event over 2-3 sessions of 90 minutes, featuring 6-9 presentations and panel debates
 - Online sponsorship will replace the Tabletop Exhibition
 - Perhaps hold a virtual dinner along with the event



3.3 Afera Steering Committee General Report 2020 by President Evert Smit



The SC: our role

- While overseeing the MKC and TC, as well as the budget, the SC's role is to ensure that Afera works for you to access resources, including information, people and organisations and institutions, that support you in a neutral atmosphere to understand what is important to run your businesses successfully:
 - Increasing relevant direct or indirect influence with **regulatory bodies**
 - Establishing in next-level, **globally recognised TMs** > and engaging in the **Global Tape Forum** and **Global Test Methods Committee**
 - Raising Industry awareness and necessity of **sustainability** and that it is an opportunity
 - Providing high-quality **webinars, meetings** and **events** that provide you with contacts and understandable , up-to-date information
 - Engaging with **organisations in adjacent technologies**
 - Recognising the **trends**

The SC: our role

- With the advent of the pandemic, we zeroed in on these priority areas, introducing our Webinar series “Navigating the COVID-19 crisis within the adhesive tape value chain” and carried that support through added online content and the virtual Annual Conference Sessions (free to Members)
- Our Member Survey this week tells us we are on the right track



The SC: our role

- Over 50 Afera Members responded

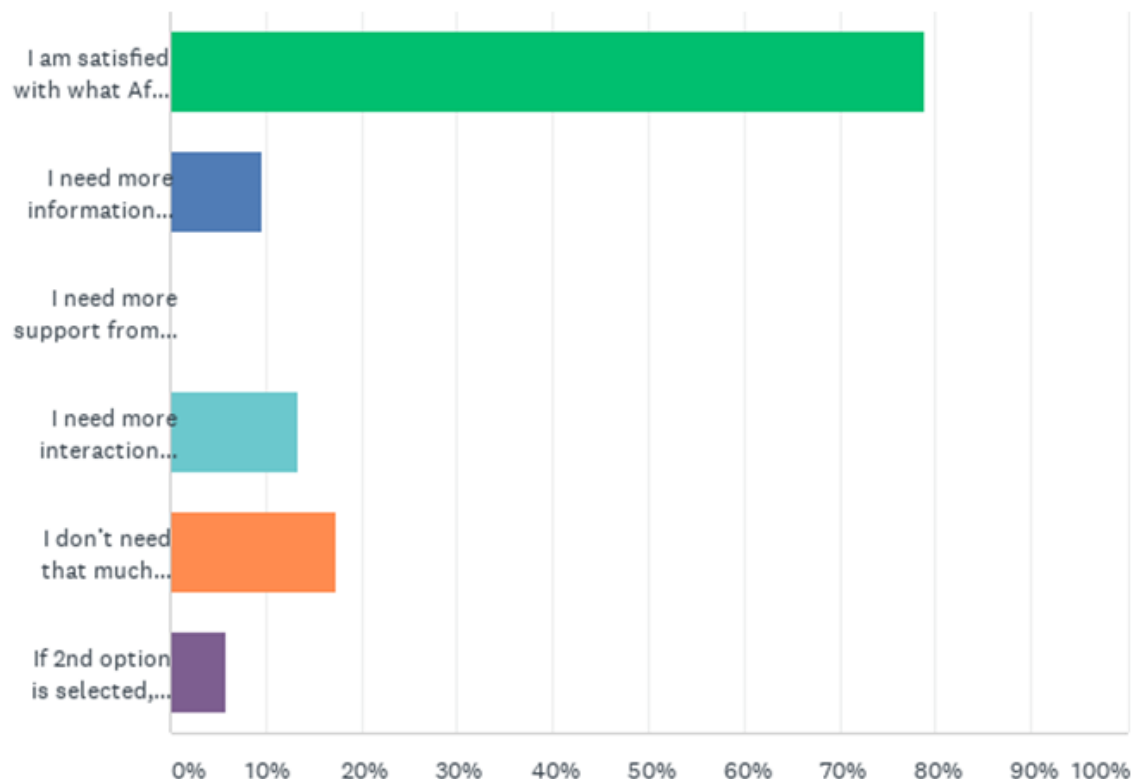
How do you feel about Afera's activities agenda since the onset of COVID in 2020? (Please rate on a scale from 1 to 5 - 5 being most positive)



The SC: our role

V2: Do you feel that you have gotten the support you need from our industry collective in 2020? Please check the following as they apply:

Beantwoord: 52 Overgeslagen: 0



The SC: our role

ANTWOORDKEUZEN	REACTIES	
I am satisfied with what Afera has offered me, and I have processed the information provided to me and participated in online meetings and Webinars when possible	78.85%	41
I need more information about news and developments in our industry. Which areas? (please add to the comment box)	9.62%	5
I need more support from Afera in managing our business in the Industry	0.00%	0
I need more interaction with fellow industry colleagues, partners, customers, etc.	13.46%	7
I don't need that much interaction or support, and I am pleased with my current Membership.	17.31%	9
If 2nd option is selected, which areas?	5.77%	3
Totaal aantal respondenten: 52		

Organisations in adjacent technologies

- Working together where activities overlap:
 - FEICA, The European Adhesives and Sealants Association
 - IVK, The German Adhesives Association
 - FINAT, The European Self-Adhesive Label Association
 - RadTech Europe, The European UV/EB Curing Technology Association
 - Cefic, The European Chemical Industry Council
 - CheMI, The European Platform for Chemicals Using Manufacturing Industries
 - EPRC, The European Paper Recovery Council
- Areas of co-operation identified:
 - Regulatory and environmental issues
 - Sustainability
 - Circular Economy
 - Institutional research



Markets and technology trends

- We are watching and reacting to the trends we see driving the Industry at different speeds:
 - Going green (water-based, hot melts, etc.), maybe in 2021, stronger in 2022
 - Towards sustainability, recycling, renewables, etc., especially for adhesive makers and carrier and liner makers, who are at the forefront of the Industry
 - The suppliers, which are often larger than the tape producers, are the innovators, dictating the trends, and are setting themselves up well for a greener future, which the tape manufacturers will follow. But this depends on your strategy...

Members

Active: 44

Associated: 44

Converter: 11

Affiliated: 4

Total: 103

New: 3

Exited: 6



4. Financial report

4.1 2019 Balance Sheet

4.2 2020 Budget and Latest Estimate

2021 Budgets A and B



Proposal to adopt 2019 Balance Sheet and 2020 Latest Estimate

5. Approval of 2021 Budgets A and B



Proposal to adopt 2021 Budgets A and B

6. Membership fees

- Our membership fees for Active, Associated and Affiliated Members will remain unchanged in 2020



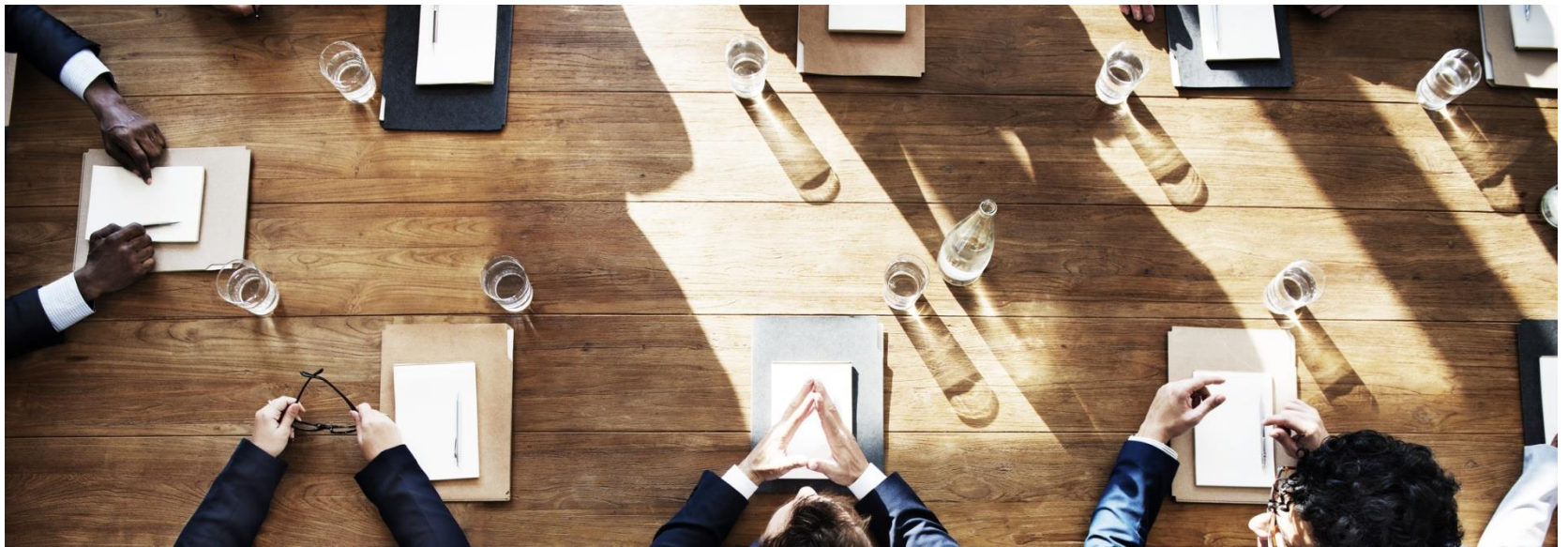
7. Steering Committee composition

Representing	Company	Candidates	Until
Tape Manufacturer	Lohmann	Evert Smit	9/2021
Tape Manufacturer	TBD	TBD	?
Tape Manufacturer	tesa	Reinhard Storbeck (TC Chair)	9/2021
Tape Manufacturer	American Biltrite	Jacques Geijsen (MKC Chair)	9/2021
Tape Manufacturer	Nitto	Dirk Pittoors	9/2023
Converter	Egebant	İbrahim Hatipoglu	9/2021
Supplier	Loparex	Ian Grace	9/2021
Supplier	H.B. Fuller	Melanie Ott	9/2021

Rotation Schedule:

Presidency	Years	Vice Presidency
Evert Smit	2018-2021	TBD

Proposal to adopt Steering Committee composition



8. 2021 Events

- Virtual 9th Afera Technical Seminar ~April 2021
- 64th Afera Annual Conference
29 September–1 October 2021
Hotel Las Arenas Balneario Resort Valencia, Spain
(face-to-face)



9. Any other business





10. See you soon!