

# Afera Annual Conference 2019 is a resounding success

## Experts cover future workforce, disruption, business intelligence and conservation



The European Adhesive Tape Association's premier yearly event took place last week at the Pestana Palace Hotel in Lisbon, Portugal, boasting the highest attendance rate ever, 10 intriguing future-focused presentations, numerous networking opportunities and a beautiful location in one of Europe's accessible and inspiring metropolises.

Focussing on "Making the Tape Business Future-Proof", including its effect on the workforce, business models, supply chains, sales channels, technology, product development and the application process, the Conference provided over 150 tape industry

professionals with the opportunity to interact with tape industry leaders, sales and technology drivers and field-expert speakers. Attendees came from 15 European countries plus India, Turkey and the U.S. and included delegates from businesses along the entire adhesive tape value chain: tape manufacturers, suppliers (raw materials, machine and packaging), converters, distributors, research institutions, national tape organisations and other international counterparts.

"I keep saying it every year, but it is true: This is one of the best Annual Conferences Afera has ever put on!" reported Evert Smit, Afera president and head of R&D at Lohmann GmbH & Co. KG. "Firstly, the event showed that there are a lot of topics and issues moving in the adhesive tape industry, and we were able to harness them for this event. And as Afera does, we will continue to build on them. Secondly, the human factor was secured, because we are a family—this group behaves like a family."

"Year over year, the Annual Conference increases in quality and value to our Members," explained Jacques Geijssen, Afera Marketing Committee chairman and managing director at American Biltrite, Inc. EMEA and ABItalia. "It is the perfect platform from which 'competitive colleagues' can form their opinions, and our participant survey feedback enables us to continue fine-tuning the event."

### It's about more than just business intelligence

A plethora of buzz topics headed the Conference working programme, which took place over 2 days. Bert van Loon, marketing innovation expert and independent strategist, was one of the masters of ceremonies. "We started and ended on topics involving Millennials, going full circle with both positive and negative outlooks," Mr. Van Loon shared. "But what we all have in common is the future: the opportunities and also many considerations of human nature, ethics and technology. Afera delivered the whole package."

## Workforce

“I saw many new faces—*young* faces in the audience,” Mr. Smit commented. This was fitting as “future workforce” is one of Afera’s newest foci. According to our recent survey, 65% of Afera Members say that talent retention is a serious challenge in their businesses.

The European tape industry is specific in its field parameters, characteristically low in unemployment and fluctuation, and high in competition. Because experts are hard to find and European geographics can prove difficult, working in the tape value chain

needs to be made attractive to various target groups. To this end, [Deloitte Consultant Christiane Schober](#) discussed the annual [Deloitte Global Millennial Survey](#) and what businesses should do to capture the hearts and minds of the younger generations.

“We are currently 5 generations of workforce working together, a dynamic that business hasn’t dealt with before now,” said Mr. Smit. “The challenge for our companies is finding the right personnel, because not doing this is going to limit our growth.”

## Automation

According to [TU Wien Professor Dr.-Ing. Sebastian Schlund](#), implementation is still at the micro level, and experts predict that 60-70% of human jobs will be taken over by robot systems in the next 25 years. In the short- and medium-term, assistance systems will shape future workplaces; however, “workplaces and skill sets *will* change,” Mr. Smit emphasised. “Nobody can predict when disruption happens.”

## Artificial intelligence

Many are in search of hard data and facts, so they can run figures and arrive at conclusions like accountants. [CREAX’s presentation](#) on using AI data research demonstrated to Afera Members that what counts is what is being spoken about by scientists, consumers and corporates. What are your customers speaking about? Global auto-topicing “adhesive tape” can lead to interesting soft data gained from papers, blog comments and patent families—things you may know, but things you may *not* know about discussions and trends.

## Nature inspiring us to develop and conserve

Geckos, velvet and sandcastle worms, fly larvae and muscles are amazingly stirring research in marine environments and also in the field of medical tape applications. [Professor Dr. Marleen Kamperman](#) explains a bioinspired polymer-based adhesive system that is easily applied due to low viscosity, easily manipulated because of immiscibility with water, effective in the presence of water, strongly adherent to diverse surfaces, fine-tunable in its cohesive properties, and limited in swelling in situ.





In his presentation “Life, the universe and everything”, [Ian Grace, Afera Technical Committee vice-chairman and business development manager at Loparex B.V.](#), challenged all of us to take stock of the toll of our outlook and our daily habits on the environment. Deforestation and degradation and animal extinction rates are haunting. Current data on the presence of CO<sup>2</sup> in our atmosphere can be misleading, even higher than the 300-400 ppm Mr. Grace estimated. If we must change the way we’re living, is this also a wakeup call for our industry?

“The futuristic programme on Day 1 got me thinking,” commented Christian Gromes,

head of sales and business development of the thermal management division at CMC Klebtechnik GmbH. “To be successful in the future, is your business willing to do a little more to make things happen, or do you want to stay comfortable in your current way of doing things?”

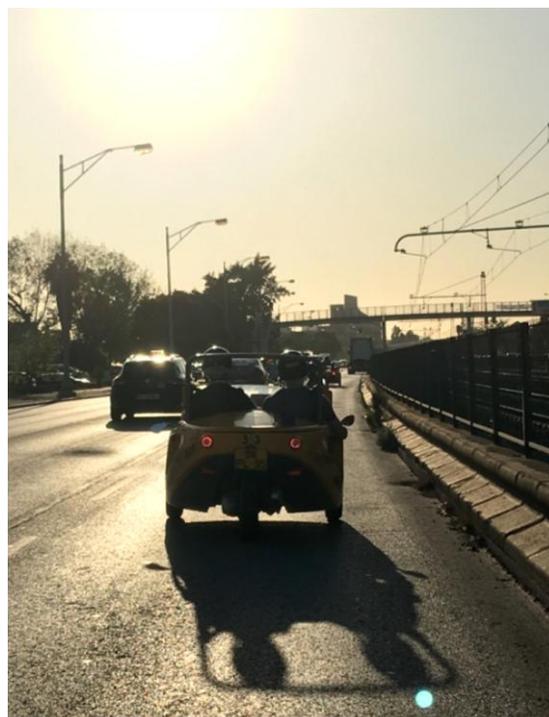
### Market trends and data

There is a lot of intelligence on the markets and how customers and regions are behaving. Collecting and analysing this optimally may require computing beyond human capacity. [Matthias von Schwerdtner, Afera Marketing Committee Member and corporate vice president of development at tesa SE](#), gave us the big picture: The adhesive tape industry globally remains a highly fragmented and heterogeneous market, and growth over the next few years is predicted at between 2 and 5%. Specialty adhesive tapes market growth is linked to expanding electronics and healthcare industries.

### Raw materials

Master of ceremonies [Melanie Ott, Afera Steering Committee Member and business manager of tapes and labels at H.B. Fuller](#), agrees with Mr. von Schwerdtner that global growth rates for tapes are moving faster than the economy. For the tape business, there is a slightly reduced volume of adhesive raw materials.

What is key: We are very irrelevant to crude oil output, as only a small portion of this goes into adhesive raw materials. But the tapes business needs this feedstock, such as solvents, acrylic monomers and synthetic rubbers, to make adhesives. Over the last few years, there has been a shift in cracker output from heavy to lightweight materials. Although oil prices should stay stable over the next few months, the world economy is slowing and demand is down. What would happen to our industry if the feedstock became unavailable?



## Regulatory trend

Among other current tech trends, [Mr. Smit](#) discussed regulatory legislation in Europe, North America and China, including the increasing importance of the E.U. Circular Economy Action Plan and individual company sustainability programmes and products. And, he warned, “Polymer REACH” is coming, so he encouraged all Afera Members to start talking with each other about this.

“Regulatory issues are a power around us,” he said. “There’s nothing we can do about it, except to preempt it by starting to act on them now, like a predictive maintenance for our own industry.” Why adhesive-tape-related companies were successful over the last 3 or 4 decades is not necessarily the reason they will be thriving 5 years from now.

“Making sure our business is future-proof is not a simple concept,” explained Mr. Smit. “You cannot assume tapes will always be used for bonding. Many great technologies have disappeared very quickly.” We must strive to predict the future accurately to ensure that we in the tapes business are part of it.



## Building & construction segment

In 2016, Afera’s North American counterpart, the Pressure Sensitive Tape Council (PSTC), surveyed the design/architect community about opportunities to replace liquid adhesives with tapes. The report revealed that within the building & construction industry, there are low levels of familiarity (27%) about the benefits of using tape as opposed to using the more traditional methods of bonding found in that industry.



[Graeme Roan, PSTC Marketing Committee chairman and product manager of global adhesives at Synthomer](#), outlined the high growth potential for PSA tape use within the B&C segment. This finding led to the PSTC launching a second phase of their research study in 2017, beginning with a survey focused on specific B&C applications for which PSA tape can be used, as well as those factors that may influence choosing tape for various bonding projects. At the PSTC’s latest Tape Summit, they launched the themed industrial seminar *Building & Construction Industry: Markets and Application Track*.

“Go specialty!” Mr. Smit echoed. “In addition to electronics and healthcare, focus on B&C.” You don’t need to produce “the big tape to wrap a house”, but niches such as “smart homes” are sure to take off.

## Big data and AI

[AllyMatch GmbH's Isinay Kemmler](#) says that collecting, processing, analysing and managing big data has its challenges in terms of quality, but this can be managed. She has a positive outlook about automation and AI. "It doesn't mean that human skills will be lost because machines are doing all the work for us," she said. "Our brains will be trained in a different way; other human skills will be needed."

"On the subject of big data, I get the feeling we are just scratching the surface," reacted Mr. Smit. "Looking around the Conference room, many of us won't admit it—and even in light of competition law, we are allowed to—but I know that many companies here are performing predictive maintenance."

## Committee Meetings and General Assembly

Lisbon's working programme also featured Afera's semi-annual [Technical, Marketing and Steering Committee](#) Meetings and Afera's annual General Assembly. More than a dozen issues and activities were discussed, decided upon and moved forward.

Afera pinpointed its role in bringing together all the players of the adhesive tape value chain and also those who work in adjacent technologies. Co-operation with global counterpart associations such as the PSTC (North American tape industry) and CATIA (Chinese tapes industry), as well as FINAT (European label industry), FEICA (European adhesives industry) and IVK (German adhesives industry) in the areas of regulatory affairs, sustainability, the Circular Economy and institutional research is being explored. Whereas FEICA focuses on substances and mixtures, Afera and FINAT represent tapes and labels respectively as "articles" under REACH, the European Chemicals Policy.

In the European and global regulatory arena, Reinhard Storbeck, Afera Technical Committee chairman and director of R&D at tesa SE, said that stepping up monitoring and activity was a top priority. He is currently in the process of recruiting a new Afera Regulatory Affairs Manager in order to be more actively involved on behalf of the European tape industry. "The regulatory landscape will change the way we all operate over the next decade," he emphasised. "We need to inform and support each other in transitioning our businesses." Building engagement in regulatory affairs and their trends will see the formation of a related Association sustainability policy.

Mr. Storbeck also reported on the Afera's test methods development programme, the 2020 edition of the *Afera Test Methods Manual* (free to all Members), the successful 9<sup>th</sup> Tape College in Brussels, Afera's 9<sup>th</sup> Technical Seminar planned on 6-8 April 2020 in Brussels (including a new tabletop exhibition), and the 7<sup>th</sup> Global Tape Forum & Global Test Methods Committee Meetings planned on 17-19 November 2020 in Osaka, Japan.





On behalf of the Marketing Committee, Mr. Geijsen discussed developing the online presence of Members through profiles at [afera.com](http://afera.com), namely company descriptions which will help with buyer journeys and enquiries. “Member of Afera” logo-links on company websites encourage visibility within the value chain ecosystem.

Afera has specific goals in Member recruitment: “Tape manufacturers will always be at the core of the Association, as that is our origin,” reported Mr. Geijsen. “We have added backing suppliers, liners, machine

makers, machine coaters, converters, and polymers and adhesives manufacturers.” The Association’s Membership conservatively represents 70% of tape volume produced in Europe. As of last year, the Steering Committee decided on extending Membership through the supply chain to companies closer to the end user, distributors of adhesive tape.

Mr. Geijsen also covered Afera’s increasing presence in social media: the [Afera member tape network](#) and [Design that sticks](#) Twitter accounts and the [Afera, The European adhesive tape network](#) LinkedIn account.

“As a guest, I attended the MKC Meeting for the first time and was impressed by the significant discussions held around the strategic work streams of employer branding, sustainability, new Member engagement and communications initiatives,” remarked Estela Viegas, EIMEA communications manager at H.B. Fuller.

### **Outside of the conference room**

Attendees of the Lisbon Conference also enjoyed cocktails in the Hotel gardens and dinner in the old stables attached to the Hotel on the first night. A gospel choir added to the ambience. On the second day, all participants got to discover Lisbon’s waterfront by GoCar, electric bicycle, Tuk Tuk and speedboat, then had drinks and dinner at Kais Restaurant. During the alternate social day programme, partners were treated exclusively to tours of Lisbon’s historic centre and the Belém district (including the Jerónimos Monastery), painting tiles at the National Tile Museum and a cooking lesson.

## What participants had to say

*I wanted to be here to figure out what people are thinking and what the trends and key focal points are for our market. We tend to live in our own world and benchmarking our thoughts and ideas against those of the rest of the industry is important. I was not disappointed.*

**Jean-Loup Masson**

**Director of Innovation, Marketing and Digital, SVP**

**Novacel**

**Tape manufacturer, France**

*The Conference tackled the sustainability of our business perfectly, including topics on the environment (i.e. what is the impact on our industry and how can we contribute positively via new developments, such as the use of AI in processes?) and human resources (i.e. how do we deal with new generations in order to attract qualified personnel and retain them?).*

**Michel Sabo**

**R&D ANT and Planning Manager**

**Nitto Europe**

**Tape manufacturer, Belgium**

*I'm really happy to see so many people from our industry here—both old and new—and that everyone is even more open than they were in the past.*

**Jeanet Klein**

**Area Manager**

**Sekisui Alveo Benelux,**

**Nordics & Baltics and**

**France**

**Supplier, The Netherlands**

*I came to the event to see how the tape business has evolved: Who are the players? Are there new players on the scene? What are the market trends? The General Assembly provides a great, really effective overview of what is going on in the business, and what elements we can incorporate into our own business strategy.*

**Jörn Meuwissen**

**Director of Sales, Europe**

**Intertape Polymer Europe GmbH**

**Tape manufacturer, Belgium**



*The purpose of Afera's Annual Conference is for people to see each other, and I've noticed a lot of breakout meetings taking place between parties.*

**Herbert van Arkel**  
**Commercial Director**  
**Supertape B.V.**  
**Tape manufacturer, The Netherlands**

*After working with many of our customers throughout Europe, I wanted an opportunity to see all of them at one place at one time. It's not only cost-efficient, but you can network and collaborate and learn from each other what the latest trends are.*

**Raymond Somich**  
**Global Marketing Director**  
**Omnova Solutions, Inc.**  
**Supplier, U.S.A.**



*The lectures are interesting in that they are not only specifically tape-related but offer a broader view into global business trends. Every year there is a different theme, which allows us to look beyond the realm of tape into broader business cycles that we should be studying.*

**Thorsten Meier**  
**Head of R&D**  
**Certoplast Technische Klebebänder GmbH**  
**Tape manufacturer, Germany**

*This Conference offered interesting presentations, especially about the future, for which my company is preparing. I always enjoy Afera's events immensely, and I am thankful for everyone who has joined this event. The logistics of the event were handled perfectly—I especially loved the food, hotel and location!*

**İbrahim Hatipoğlu**

**General Manager**

**Egebant Zimpara ve Polisaj Malzemeleri San. ve Tic. A.S.**

**Converter, Turkey**

*It was encouraging to see how Afera is leading important debates that are impacting the future of tapes as we know them: new technologies and sustainability. The Team is energised and starting to lead the way in the meaningful discussions on talent that matters for our industry. Lastly, Afera is opening its organisation to broader and richer co-operation with other associations, universities and market players to work together towards a common goal: how to drive business success while preserving our planet.*

**Estela Viegas**

**EIMEA Communications Manager**

**H.B. Fuller**

**Supplier, Portugal**

## Antitrust law

“We want to professionalise as an organisation,” Mr. Smit explained at the start of the General Assembly. “Because we are a group of competitors and competition law is becoming stricter, Afera is moving in time with this.” The Association has developed new materials explaining the dos and don'ts of legal behaviour in all meetings and activities. These are provided on the overhead, in handouts and digitally to make sure every participant is aware of Afera's compliance with antitrust law.

“When I saw that the Conference was conscious of potential antitrust concerns, my response was that it was great, and I was very happy they were bringing these to the attendees' attention,” reacted Aaron Weiner, senior counsel at Intertape Polymer Group. “This reinforces the training that we give our salespeople to ensure a fair marketplace, and seeing it emphasised at Afera events is very reassuring.”

### Antitrust law: important for your meeting

**The dos**

✓ **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. \*

**The don'ts**

✗ **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. \*

