



EUROPEAN NATIONAL ASSOCIATIONS' BOARD

- Present :** BPiF Labels (UK): John Bambery, outgoing President
 BPiF Labels (UK): Graham Backhouse, incoming President
 ELSET (GR): Avgerinos Chatzichrissos, President
 ESD (TR): Aydin Okay, President
 ESD (TR): NN
 FINAT: Thomas Hagmaier, President
 FINAT: Chris Ellison, Vice-President
 FINAT: Kurt Walker, Past President
 FINAT: Jules Lejeune, Managing Director
 GIPEA (I): Alberto Quaglia, President
 SLA (SE): Kaj Flick, Director
 UNFEA (F): Jean Michel Fouquet, President
 UNFEA (F): Christophe Perrot, General Secretary
 VskE (D): Klemens Ehrlitzer, Director
 HERMA (host): Ralf Drache (FINAT Board Member)
- Guests :** Bert van Loon (Young Talent Project)
 Paul de Ruijter, Jolanda van Heijningen (De Ruijter Strategy, scenarios project)
- Venue :** Regus Corporate Meeting Center, Amsterdam Schiphol International Airport
- Date :** Wednesday 19 April 2017, 11.00 – 16.00 hrs.
- Minutes :** Jules Lejeune

Before opening the meeting, a special welcome was extended to Graham Backhouse who would succeed John Bambery as the non-executive President of BPiF Labels in the UK. Like John, Graham also has a long standing (37-years) background in the label industry.

This meeting would feature two special guests, Bert van Loon, marcom partner of FINAT who had been engaged in the start-up of the Young Talent project initiated at the previous meeting, and Paul de Ruijter & Jolanda van Heijningen who would like to validate label industry scenarios that they were developing for the European Label Forum in Berlin next June.

Due to flight timing issues, the order of the agenda was amended but the report below follows the original agenda. Thanks also to John Bambery for sharing his notes which are integrated in the report below where appropriate.

1. Minutes & actions of the meeting held on 7 October 2016

The minutes of the previous meeting were approved.

2. Public Affairs

- **Follow-up FINAT AWA fact finding study release liner recycling in Europe**

As reported last year, still only 10% of 'liner' is being collected for 'genuine' recycling. Most of the remainder goes with mixed waste or could be used for thermal recycling. The release liner fact finding study initiated by FINAT and leading material suppliers last year had resulted in various follow up actions for 2017:

- i. **Converter/brand-owner outreach:** various initiatives were currently under review to stimulate awareness of the recycling solutions among target groups, including an animated video and presentations at end-user events.
- ii. **Release liner designation in circular economy package.** Here the focus would be on advocacy to change the status of spent liner as (secondary) raw material instead of



waste. The current discussions at EU level on the Circular Economy will be closely monitored in this respect.

- iii. **Recycling Award 2017.** John Bambery mentioned the UK's Zero to Landfill project as a possible nominee for an award. He highlighted the problems of trying to get 'liner' waste recycled in the UK and that for this reason, current focus was on 'thermal recycling'. Currently some 50 companies were participating in this project.

- **Follow-up FINAT/TLMI joint LCA guidance project.**
- **Harmonised food safety guidelines.** Klemens Ehrlitzer gave a short presentation on the current state of affairs with regard to their German publication. They had developed a web application with IST Metz that simplifies the 'route map' for potential UV cured label applications that may be affected by ink migration. The tool would be launched in May and would be available to all companies registering via the website (with VskE serving as the 'administrator'). VskE take the view that it is an industry wide issue, and for this reason they offered to also make this available for translation and distribution outside Germany. As VskE is a non-for-profit organization the purpose is not to sell licenses but to maximize the use of the tool. More information about the terms of use will be shared once it is available.

ACTION: EHRLITZER

John Bambery informed everyone on the status of the 2nd edition of the UK's GMP, also to be launched in May.

- **Follow up FINAT/VskE DIN engagement in ISO work item.** The final outcome of the ISO work item had been shared and FINAT had organized a webinar at the end of 2016 together with Ericson to raise awareness. The webinar recordings can be accessed via the new FINAT web portal.

3. Update joint FINAT/NAB Young talent 'workforce image campaign

Following the discussions at the meetings in Stuttgart (October 2016) and Paris (November 2015), FINAT and VskE had taken the initiative to organise a meeting with young talent from the label industry. Purpose of the meeting (held in Berlin at the end of January) was to brainstorm about possible initiatives to promote the image of the label industry to the next generation of label industry talent (whether technical, commercial or managerial). At the meeting in Berlin, also young talent from France, the UK and Sweden were present.

As a follow up to that meeting, consecutive meetings took place in Frankfurt (with VskE's young talent) and in Lisbon (alongside FINAT's Young Managers Club congress) at the end of March.

On behalf of FINAT, the project is being coordinated by its Marcom partner Bert van Loon who was also involved in the rebranding project of FINAT in 2016. Bert gave a short presentation about the outcomes so far and the proposed follow-up, which would be a three-year campaign across Europe, co-hosted by national organisations (possibly sponsored by third parties) and supported by a common portal where information about the industry, video reports, vlogs and testimonials, training and education possibilities, (dual) job opportunities and internships could be posted.

Items mentioned by attendees in the context of this presentation were:

- The face of the industry and the companies operating in it is often determined by the people.
- In Sweden, the local association is already involved in a similar project covering the whole printing industry.
- In the UK there is a lack of middle management.
- Awareness should start at secondary schools.
- In Turkey and Italy, there are ties with print engineering universities.



- Creating the right profile of the job is essential and it is of crucial importance for the united associations to lobby for a professional curriculum and registered profile of skills and competences.

The slides and a summary of the presentation as well as the invitation to national association buy into this project were circulated after the meeting. Purpose would be to announce the next steps at the time of Labelexpo Europe.

ACTION: ALL TO REVIEW PROPOSAL AND RESPOND

4. Statistics

- **Industry demography.** Following VskE's 'industry demography' presentation for Germany at the previous meeting, FINAT's Industry Trends Subcommittee had obtained a proposal from the Business University of St Gallen (CH), which had been submitted to the group prior to this meeting. Although not all present had had the opportunity to review the proposal, those who had (Klemens Ehrlitzer and John Bambery) concluded that it was not meeting the NAB's requirements in terms of scope and cost. The proposal was mainly focusing on the methodology for an annual benchmarking exercise. Not only was there no need for an annual benchmark (this would be overlapping what is already done with the spring Radar report), for a preliminary study exercise, the cost of € 9.5K was considered too high. The proposal was turned down and instead it was agreed that the FINAT secretariat would submit a questionnaire to the NAB members to identify which 5-10 benchmark parameters would be most commonly required and comparable across countries to give an overall picture of the size and composition of the label industry in Europe.

ACTION: FINAT SECRETARIAT (after the summer)

- **AWA material cost index project.** Those who were still participating in this exercise informed that they would continue to do so as this is a useful addition to the mix of market data provided to their members.
- **FINAT Radar and European Digital Label Printing survey (DLS).** Converter members of both FINAT and the national associations had been invited to participate in one or both of the two surveys commissioned by FINAT for this spring. The Radar survey would be released before the summer holidays, the DLS would be launched prior to Labelexpo Europe. To encourage participation in both (anonymous) surveys, respondents had been invited to leave their email address should they wish to receive a link to the survey. For the DLS (for which the questionnaire had been sent out first) this had resulted There had been a good response from Italian and German companies with over 100 replies. Preview summaries of both surveys would be presented at the European Label Forum in June. In recognition for their support, all associations would receive a teaser summary of the reports.

ACTION: FINAT SECRETARIAT TO CIRCULATE TEASER SUMMARY

5. Events (programmes & activities)

- **National Association activities.** Due to lack of time it was agreed that all associations would share an update of their (planned) activities by the end of this semester.

ACTION: ALL TO PROVIDE UPDATE OF FIRST HALF YEAR 2017 TO FINAT

- **FINAT activities.** In return for these reports, FINAT provide all national associations with copies of the FINAT Yearbook 2017 which would be released at the European Label Forum 2017 in Berlin next June.

ACTION: FINAT TO CIRCULATE FINAT YEARBOOK 2017 TO NATIONAL ASSOCIATIONS



Special topics discussed under this header:

- **FINAT ELF 2017 in Berlin:** converter members of national associations would again be entitled to participate in the ELF at the same conditions as FINAT converter members. All were asked to promote the ELF among their membership.
- **Labelexpo Europe:** the 2017 edition will again be bigger than its predecessor. Discussions about improvements of the current venue and possible alternatives are ongoing between Tarsus and FINAT in the Labelexpo Advisory Board. Several improvements are on the way for the 2017 edition. In view of increased security risks, special measures will apply in this respect. Members will be updated about the special services and benefits for visitors via the FINAT channels. As far as future editions are concerned, a change of venue is not likely before 2021, given the lead times to secure venues for events of this size.

6. FINAT scenario planning project with De Ruijter Strategy

This part of the meeting was presented by Paul De Ruijter. Basically 4 different scenarios that an aging label company owner might face when he is considering his future:

- An increase of protectionism in the face of Brexit and counter globalism movements;
- On-going industry consolidation;
- Technology disruption resulting in a complete changeover of existing business models (see Uber, Amazon, Airbnb in transportation, retail and hotel);
- Labour shortage, a shortage of qualified workers to succeed the ageing workforce and willing to consider the label industry as alternative to other digitalised industries.

All present were asked to comment on this as this would be used at the forthcoming European Label Forum. This provoked a lot of discussion that enabled Paul to tweak the exercise for the Label Forum attendees.

7. Other matters

No other matters were raised.

8. Meetings/calls 2018

A doodle request would be issued to determine the date for the next meeting or call. Jules suggested to arrange a get-together around Labelexpo where possibly also members of the Young Talent Taskforce could be invited.

ACTION: FINAT TO INVITE ASSOCIATIONS AND YT TASK FORCE MEMBERS

9. Closure

No other matters being raised, the meeting was closed at 16.00 hrs.

Jules Lejeune

The Hague, July 2017