



FEFCO summit in London was an inspirational moment for the 300 attendees

content



2-6

Editorial
FEFCO Summit
London
4-6 June 2014

7

Mr C Campaign
Follow-up

8-10

FEFCO
High-Volume
Digital Printing
Workshop

11

National
Associations
Update

12

FEFCO Activities
Events



*Roberto Villaquiran,
FEFCO President*

At the end of May, the new European Parliament was elected. Jean-Claude Juncker is now the President of the European Commission and Martin Schulz will continue as President of the European Parliament.

We want to introduce the unlimited applications and advantages of corrugated board packaging to existing and new decision makers in Brussels. With this aim in mind, we have invited the newly elected Members of the European Parliament to meet key people from our industry on the evening of 3rd September 2014. What makes the evening even more special is the launch of a joint venture between FEFCO, CEPI, our national associations and the national paper associations. I see this as the beginning of a more systematic cooperation between FEFCO and CEPI, as there are many issues in the scope of both associations' activities where we have identified a common interest.

In addition, we will continue our supply chain activities and will capitalise on the excellent work which has been done so far by the Market and Environment Committee.

We are determined to combine our forces and to tackle all issues in a cooperative way. There will be plenty of challenging questions to deal with as the European Commission continues to come up with new initiatives. Just recently, the Commission published a communication towards a circular economy which reveals highly ambitious recycling rates for all materials. This issue demands our full attention, and wherever appropriate, FEFCO and CEPI will coordinate common activities to address it.

I am confident that with this new approach we will create higher value for all members.



RE-IGNITING THE FLAME FEFCO SUMMIT LONDON 4-6 JUNE 2014



I hope that this Summit has been an inspiration. We've learned that the future is unknown, but we do know that the future will be different, change is inevitable, so let's embrace it!

*Richard Coward,
Communications Committee Chairman*

More than 300 top packaging professionals from around the world attended the FEFCO Summit in London from 4-6 June 2014. This is the 33rd time that the industry has come together to discuss important issues and trends influencing the corrugated market.

The success of the summit was due to the hard work of FEFCO's Communication Committee and the eye-catching programme. Angelika Christ, FEFCO's Secretary General, summarised the great feedback many attendees had given: "The summit provided a wonderful opportunity

to share knowledge and involve all players from the supply chain. I would especially like to thank all our sponsors for their support."

Under the umbrella theme 'Re-igniting the Flame', inspired by the successful 2012 London Olympics, many valuable



topics were discussed at the summit including the main challenges facing the corrugated industry, how to improve end-user perceptions, where grocery retail is going and how packaging producers can cooperate better with all their supply chain partners.

Here are some of the main themes and highlights of this summit

In his welcome speech, FEFCO President Roberto Villaquiran focused on the benefits of corrugated board and the fact that the corrugated industry should fight against some common misconceptions. The most unfair one levelled at corrugated packaging is the perception of it as a commodity. In order to tackle this problem, we should continue to promote the essential benefits of corrugated, and get customers and end users to re-evaluate and understand the value that our packaging has to offer. Corrugated protects, promotes and performs but it has untapped potential. "Paper is the future of packaging, and through differentiation and customer centric activity we can deliver sustainable and profitable growth" was the main message Mr Villaquiran delivered to the summit's attendees.

Corrugated and Packaging Markets Overview

Richard Coward, Chairman of FEFCO Communications Committee, opened the conference with a short history about



Richard Coward, Chairman FEFCO Communications Committee

London and future prospects and then continued with the key characteristics of the UK corrugated market which is the fifth largest in Europe. It is composed of three main multinationals. The independent sheet plant market is considerable (with more

Overall good quality of presentations - some of them outstanding.

Very good networking opportunity.

than 250 sites). He then detailed some of the key statistics and described the retail environment.

Simon Southern (NOA - PRISM) continued with an overview of the economic environment and presented some corrugated forecasts and market prospects. Simon predicted an average growth of 1.5 % p.a. In the coming years. The key factors influencing future demand will be a consequence of changing customer spending patterns combined with changing retailing structures and practices. As always, the substitution of corrugated by other materials for transit packaging and environmental considerations will continue to influence the market. He wrapped up his presentation with some thoughts about the changing role of corrugated packaging in the future. He predicted that developments in the appearance and performance of corrugated packaging will offer particular opportunities. SRP (Shelf Ready Packaging) will continue to make a difference at the point of sale. Nevertheless, some political and economic risks are persistent, and the emergence of dark warehousing for internet shopping may have an impact on decorative corrugated and SRP. Simon concluded that as always success will depend on individual strategies, business models, market segmentation and last but not least making the right investment decisions guided by a customer focused approach.

Jane Bickerstaffe (INCPEN) gave a noteworthy speech which included some

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Jane Bickerstaffe (INCPEN)

striking examples on the protective role of packaging. She introduced the work of INCPEN and explained how the research institute combats the perception that packaging creates excessive waste and litter. INCPEN promotes “well-packaged products” and its guiding principle is that there is not one single good or sustainable packaging type per se, just packaging that’s appropriate for a specific purpose. No packaging has a monopoly of environmental virtues! It has yet to be acknowledged that packaging protects far more resources than it uses. The latest INCPEN communication programme is working to help people understand that contrary to popular belief, packaging helps to prevent waste and is a positive net benefit to the environment. As part of this campaign INCPEN has produced a film called “The good, the bad and the spudly!” available on their website.

In the afternoon, Wilbert Streefland (Technology Coaching) explained how with digital printing, corrugated board is being transformed from packaging and protection to a new marketing communications medium. This is made possible thanks to striking print quality, customisation possibilities and creativity in design. He believes that the digital printing market will provide huge opportunities for adding value to corrugated packaging and competitiveness.

Corrugated Leadership Session

Miles Roberts (Group Chief Executive, DS Smith) started off by explaining that we should listen to our customers more carefully and invest more resources in fully understanding their products. It’s about bringing value by understanding the whole supply cycle and offering solutions that ultimately can reduce the total supply chain costs. Finally, his advice was “to be valued, be valuable”.

Following on, Dr Jan Klingele (Managing Partner, Klingele Group) presented his vision of the German corrugated box market and described its main characteristics. He compared small and large box makers in Germany as well as in Europe and looked at how the European market is evolving. Rounding off his speech he emphasised that in his opinion the main challenges faced by the industry are finding good people and how this will increasingly become difficult in years to come (evolving population structure), getting good fibre, remaining profitable and securing energy.

Finally, Gary McGann (Chief Executive, Smurfit Kappa Group) gave a very comprehensive overview of the general

environment for business. He underlined the fundamental uncompetitiveness of industries in Europe compared with other parts of the world. Summing up, he emphasised the absolute necessity for the paper and board industry to make real progress towards renewed European competitiveness. To address this critical issue requires a strong and united voice in Brussels and this is why as Chairman of CEPI he is pushing for increased cooperation and open dialogue between CEPI and FEFCO. The paper and board industry has many positive attributes to build on and as an industry we should make it known.

The organisers from the FEFCO Communications Committee were convinced that the exemplary organisation of the London Olympics in 2012 would benefit the top management of the industry

Lessons learnt from the 2012 London Olympics

The organisers from the FEFCO Communications Committee were convinced that the exemplary organisation of the London Olympics in 2012 would benefit the top management of the industry. The gamble paid off as this part of the programme was very much appreciated. With her very motivating speech, Jean Matthews (formerly Head of Catering Cleaning and Waste – London 2012) went over the preparation of the incredible task of preparing 17 million meals, in 147 locations for a period of 17 days. The success was mainly due to people management “If you expect great things of people they rarely disappoint you” and of course a lot of involvement, preparation and close partnership with suppliers.

Lawrence Waterman (Head of Health and Safety - Olympic Delivery Authority) described how through “Leadership and Worker Engagement” he and his team succeeded in avoiding any fatal accidents during the huge construction work of the London Olympics. He gave an extraordinary lesson in project leadership. These are the key words to remember: “Prevention”, “Worker Engagement”, “Reward and Recognition” “Teamwork” and if you want to make good progress, don’t repeat what you have already done.



Dan Brunton (Moderator), Gary McGann (Chief Executive, Smurfit Kappa Group), Dr Jan Klingele (Managing Partner, Klingele Group) and Miles Roberts (Group Chief Executive, DS Smith)





Andrew Revel, Faraday Centre for Retail Excellence

Retail & Customer Perspectives

This session was one of the highlights of the summit, as delegates were eager to hear what their customers - end supply chain partners - had to say about their packaging requirements. The importance of corrugated partners working closely with their customers to understand their future needs in an evolving retail world was emphasised by speakers at this session.

Andrew Revel (Faraday Centre for Retail Excellence) summed up the changes in the retail environment and listed the hot consumer trends. He said packaging producers should follow and monitor closely these technological evolutions if they want to take advantage of them. The future is unknown but we do know that it will be different. Many futuristic applications may not seem to be directly relevant to our market now but experience shows that they can catch on more quickly than



Paul Earnshaw, Tesco

we anticipate. The following are just a few to watch out for: technologies related to mobile devices, consumer centric indicators, augmented reality, personalised and customised packaging, printed electronics, smart displays and the growth of home-shopping.

In his presentation James Walton (IGD) gave a quick review of the economic background and then highlighted the key strategic issues that retailers are facing today. A large part of his address was dedicated to what suppliers and retailers in the food and drink industry expect from packaging. They require many things such as enhanced sustainability, product integrity and reduced operational cost, both in supply chain and logistics as well as on the shop floor. In that respect RRP - Retail Ready Packaging - could greatly help. They also need a drastic reduction in waste and closer cooperation with packaging suppliers in order to develop optimised and innovative designs. In the future, the growth in multichannel retailing will be a major challenge for packaging producers and the industry will have to get ready for this.

In his speech, Tesco's Paul Earnshaw said: "We need to engage with the packaging supply chain because packaging offers us a huge opportunity. But the corrugated industry needs to identify the benefits, not the features, of their packaging, and put the consumer at the centre of everything they do." He went on to explain that corrugated industry suppliers should understand the retailer's challenges, and put the consumers' needs in the centre rather than their own packaging. Tesco is interested in all the benefits that corrugated solutions could bring.



Alison Coudene, Nestlé

Alison Coudene of Nestlé told the audience: "Packaging has a critical role in reducing waste and complexity across the supply chain. We also need the corrugated industry to help us differentiate ourselves with innovation." Corrugated board's qualities in terms of printing, design, hygiene, logistics, sustainability and protection are well known, while its flat printable surface is ready-made for exploiting digital platforms, such as smartphone apps and Quick Response (QR) codes. All this meets the consumers' growing appetite for instant access to product and dietary information.

FEFCO was pleased to have Simon Irons (2 Sisters Food Group) presenting the views of an own label producer. According to Simon there are four things to focus on in order to exceed customers' expectations: have the lowest price, be the most flexible, be sustainable and be



James Walton, IGD



Simon Irons, 2 Sisters Food Group





Marco Mensink, CEPI Director General

innovative. To achieve this requires a good mix of value chain optimisation, fast reaction to demand, care and expertise in corporate social responsibility and finally a real capability to innovate.

FEFCO and CEPI Activities

Ben Blydenstein (FEFCO Market & Environment Director) presented his work in advertising and PR as well as in various research fields. He gave an update on the Mr C campaign and its local developments as it is increasingly adopted by national associations. The latest campaign highlighted the benefits of corrugated packaging for fruit & vegetables and is shown in the end pages of FEFCOConnect.

Marco Mensink, the new CEPI Director General made a noteworthy speech on the CEPI Two Team Project which was initiated after the launch of the CEPI "2050 Roadmap to a low-carbon bio-economy". In order to meet its ambitious goal the paper industry had to come up with new ideas or breakthrough technologies.

The project consisted of two teams of experts competing to identify these technologies. The outcome was presented to the FEFCO audience which was noticeably impressed by these potential technological breakthroughs and the wish was expressed that such innovations should also benefit the corrugated packaging industry one day.

Concluding the final conference session, Angelika Christ (FEFCO Secretary General) and Marc Van Damme (Production Committee Chairman) listed FEFCO's achievements in various fields of activity, be it EU affairs, communications or technical. They stressed the very positive results of the last Technical Seminar and reminded the attendees what the main features of the corrugated plant of the future will be: digital, a focus on a unique selling proposition, technology driven and of course human focused.

In his closing address, Richard Cowards summarised the main conclusions of this two day conference. He summed up the

remarks made by the supply chain players and stressed that corrugated packaging will have to be cost effective, innovative, sustainable, multifaceted and flexible to be successful in the future.

In addition, the industry must continue to work hard to make it an attractive place to work for the younger generation and women; it has to evolve and become progressive and forward thinking.

Richard Cowards hoped that the summit had been an inspirational moment for everyone and that attendees will want to perform like Olympians when they get back home!



Marc Van Damme (Production Committee Chairman) and Angelika Christ (FEFCO Secretary General)

SPONSORS

FEFCO wishes to thank its members for their kind sponsorship of the summit



for the welcome cocktail at the Millennium Gloucester Hotel
www.paper.org.uk



for all the coffee breaks
www.tereos-syral.com

And also



THE DINNER AT GUILDHALL



London was an excellent venue and the dinner at the Guild Hall was truly special.



NEW TEAM MEMBER TO HELP MR C PROMOTE THE BENEFITS OF CORRUGATED



'Take a fresh look at Corrugated' is the theme of a new campaign recently launched by FEFCO. The objective is to communicate corrugated packaging's benefits to specifiers of packaging for fruit & vegetables (F&V). Advertisements and supporting editorial will appear in major European F&V titles and the leading national F&V publications in Germany, Italy, Spain, UK and Benelux. The campaign is running in June / July and will continue from September to December.

As you will appreciate, 'Mr Corrugated' has been promoting the benefits of our product. However we feel that he needs someone to help him - two people can demonstrate our benefits more effectively than one.

THEREFORE WE'VE INTRODUCED A NEW CHARACTER 'MS CORRUGATED'!

Together they communicate, in a fun and memorable way, the many ways in which corrugated packaging effectively transports, protects and promotes fruit and vegetables. You can see them together in the visuals on this page. We've also included three of the advertisements on other pages of this edition of FEFCOConnect.



For further information, or access to visuals for use in your own communications, please contact ben.blydenstein@fefco.org

WE'RE FULLY STACKABLE

MIND YOUR HEAD!

We're the packaging with a common footprint (CF). This Europe-wide standard guarantees safe and efficient stacking of fruit and vegetables and ensures that every tray fits precisely onto common pallet sizes.

Who are we?

FEFCO Workshop

High-volume digital printing on corrugated board

18 JUNE 2014 – BRUSSELS

130 delegates from all over Europe attended this one day workshop organised by FEFCO on 18 June 2014 close to Brussels airport. Angelika Christ said that FEFCO was extremely pleased that so many companies could join this event, thus demonstrating that FEFCO continues to offer a useful service to its members.

The aim of the workshop was to evaluate the potential of digital printing and to spread information regarding recent technological developments. It focused mainly on high

volume digital printing technologies for the corrugated packaging sector. This one day event confirmed that expectations are high from the industry's customers.



Marc Van Damme and Wilbert Streefland

The workshop programme was put together by the FEFCO Production Committee chaired by Marc Van Damme with the assistance of Wilbert Streefland. Six companies were invited to present their products and views on the latest trends regarding digital printing. They shared their thoughts and expertise, with Nick Kirby from Swanline sharing his companies' journey in making the transition from analogue to digital printing.

The workshop started with an introduction entitled "Defining Digital Print on Corrugated Board" and the day continued with informative presentations from each of the speakers.

The demand for digital printing is mainly customer driven (principally FMCG customers, packers & fillers and retailers). Stijn Govaert from ESKO identified the following drivers which are pushing the industry to move from analogue to digital printing:

- Accelerated time-to-market
- Last minute changes
- Versioning & personalisation - from mass marketing to my marketing



Speakers

Stijn Govaert – ESKO, Sylvain Rebet – BOBST, Ronen Zioni – HP SCITEX, Nick Kirby – Swanline, Sean Moloney – Sun Automation, Dennis Van Ijzerloo – Barberan, and Melissa van Gelderen & Rui Cardoso – XANTÉ Europe.

- Regional marketing
- Lead times reduction, forecast corrections
- Rapid response to consumer demand and just-in-time manufacturing
- Zero inventory, waste reduction
- Improved supply chain management

“It is a real revolution,” said Angelika Christ, FEFCO’s Secretary General. “Now, with corrugated packaging, the medium really can become the message”

Shorter print runs are a consequence of these **changing dynamics** in fast moving consumer goods. In addition, cost reduction and enhanced brand image are the two main considerations driving customer packaging decisions.

With digital printing, corrugated board is being transformed from packaging and protection to a new marketing communications medium, thanks to striking print quality, and the possibilities for customisation and creativity in design. At the same time, digital printing allows fuller use of new technologies such as QR codes and augmented reality (AR), enhancing the customer experience by making the packaging interactive. And along fragmented supply chains, unique QR codes printed on packaging are helping to share data.

Some essential questions remain: **Is High-volume digital printing on corrugated board now becoming a reality? And how does the industry manage to transform corrugated board into fully customised and customer oriented packaging and displays?**

Ronen Zioni from HP SCITEX reminded the audience of what Benny Landa, founder of Indigo (he sold his company to HP in 2001) said: “Everything that can become digital will become digital, printing is no exception.”

Mr Zioni went on to remark that demand is exploding and illustrated his point with some figures: the total addressable market of digital printing on corrugated is valued at \$1.5 billion, with a potential of 87 billion sqm (+50% growth. Source: HP internal data).

According to Sylvain Rebet of BOBST, from a production perspective the ideal digital printer for corrugated packaging needs to be able to do the following:

- Print mass volumes
- Print on very different substrates



An example of packaging printed by Swanline.



A wall made of boxes digitally printed by ESKO for the workshop.

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CORRUGATED OF COURSE

www.corrugated-ofcourse.eu/fresh



Ronen Zion, HP SCITEX



Sylvain Rebet, BOBST



Nick Kirby, Swanline



Sean Moloney, Sun Automation

- 4 colours CMYK covering most Pantone colours
- Print variable data (images, graphics, codes, text)

BOBST is currently testing its latest continuous ink jet system printer which should be available before the end of 2015 with delivery in 2016. Mr Rebet also remarked that "the future is simpler as the command to print will go directly from computer to printer". This will have a huge impact on processes as it requires a complete Digital Packaging Value chain. Sylvain Rebet concluded that "we all have to learn the language of digital!"

Dennis Van Ijzerloo from Barberan introduced their Jetmaster digital printing machine (UV ink) and explained how it responds to market demand for shorter runs at no additional cost. It also offers branding flexibility (personalisation, differentiation, variability) and shorter lead times, all with the highest possible print quality.

A view echoed by most of the speakers is that digital print means shorter print runs, which in turn means a need for more orders creating more administration and prepress work. There is growing market potential for corrugated board manufacturers but the risk is to overlook administration capacity and pre-press capacity. This needs to be addressed with the introduction of new automation software.

According to Marc Van Damme, FEFCO Production Committee Chairman and Chief Technical Officer for VPK Packaging Group: "It's not just about switching to digital, it's about rethinking your work process".

Nick Kirby from Swanline described his recent hands-on experience with digital printing. In terms of investment, a move to digital is more than just purchasing a new printer, it also requires an investment in people through training, recruitment and

new software. In addition, any company making the switch to digital, will have to adopt a robust maintenance programme, gain supplier support, and learn about new markets and new processes.

It is important that a potential customer looks at the whole picture and not just the ink and printing costs. Despite the fact that these are higher, it is possible to produce at a competitive and stable price, which Sean Moloney from Sun Automation demonstrated when showing some printing examples from their CorrStream® single pass, drop on demand industrial inkjet.

Melissa van Gelderen and Rui Cardoso from Xanté rounded off the workshop with a presentation of their Excelagraphix High Speed Inkjet. They explained the benefits of on demand printing for corrugated boxes and demonstrated that print on demand is possible and can be profitable.



Dennis Van Ijzerloo, Barberan



Stijn Govaert, ESKO

In conclusion, it appears that the industry is ready to adopt a digital mind-set but it must be prepared for the higher demands that will arise from this technological shift. As a move to digital printing is inevitable it is equally important to remember that analogue printing will not disappear.

To make it a win-win approach it is essential to select the appropriate technology for each specific case, guided by the customers' expectations. FEFCO is confident that the industry will successfully use this new technology which will contribute to the revitalisation and competitiveness of the corrugated packaging sector.

As Wilbert Streefland quoted paraphrasing Charles Darwin: "It is not the strongest industry that survives, but the most adaptive". This workshop demonstrated clearly that the digital printing market will provide huge opportunities for adding value to corrugated packaging.

National Associations Update

AFCO Business Forum



Every two years, the FEFCO Spanish member AFCO (**Asociación Española de Fabricantes de Envases y Embalajes de Cartón Ondulado**) organises "The Business Forum" for key players from the Spanish corrugated board industry. Both producers and suppliers attend this important biannual event which took place in May at the Hotel Eurobuilding in Madrid.

Among the distinguished speakers who attended the event, Carlos Rodriguez Braun, a well-known Argentinian economist, gave a presentation on the most important economic and financial issues from a macroeconomic point of view.

The world famous extreme mountaineer, Juan Oiarzabal, the man who has more 8,000 meter peaks to his name than anyone else in history, gave a speech on motivation and how to achieve goals in an inhospitable environment.

The Forum has been the most important event of the corrugated industry in Spain so far this year. The next event will be AFCO's congress in May next year.

For further information please contact AFCO at: afco@afco.es
+34 915 711 702 – www.afco.es

CITPA is the umbrella organisation for paper based converters and related industry associations across Europe.



At the April meeting in Brussels the CITPA Board took the opportunity to review the way it will work in the future and to focus on key issues.

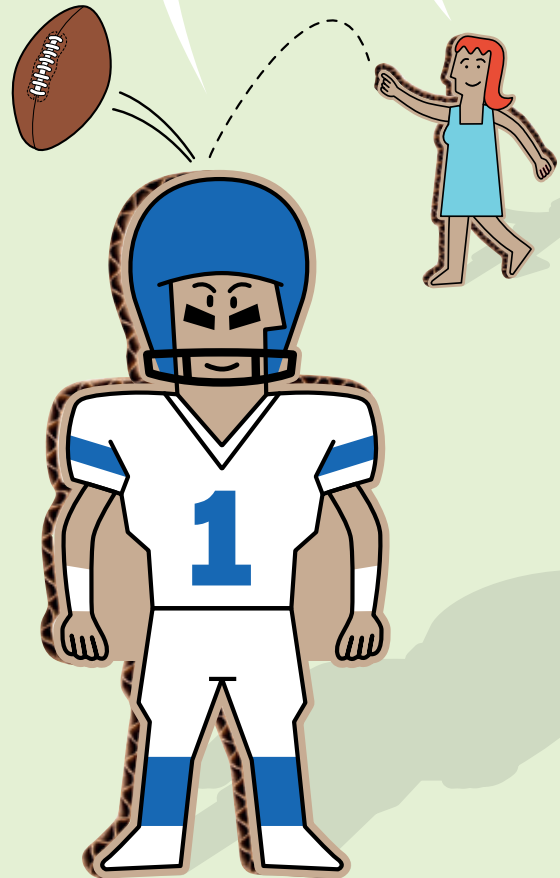
The objective is to maintain CITPA's presence as a co-ordinating body for regulatory affairs for the European Paper & Board converting industry. This enables cooperation on core issues whilst encouraging associations to lobby directly on matters of specific concern to them. Three committees will continue to cover environmental, product safety and social issues on behalf of its members.

Bob McLellan is President while Angelika Christ was appointed as the new Secretary General with Jennifer Buhaenko as the new Director.

Should you have any questions, please contact jennifer.buhaenko@buhaenkoassociates.com or on + 44 1371 856 577

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FEFCO Activities

A big welcome to the following new Sympathiser and Corresponding members who have recently joined FEFCO:

Sympathiser members

Kadant Johnson Deutschland GmbH
Germany
www.kadant.com

Inca Digital printers
UK
www.incadigital.com

FUJIFILM Speciality Ink Systems Limited
USA
www.fujifilm.com

Corresponding members

Al Watania for Industries
Saudi Arabia
www.wataniaind.com

Corrugated Synergies International, LLC
USA
www.csicorr.com

EU Affairs Update

It is a hot summer in Brussels, both from a weather and political point of view.

The opening of the new European Parliament took place on 1 July 2014 and many new parliament members were welcomed (51%). Despite the fact that the recent European elections have brought new parties and independent candidates

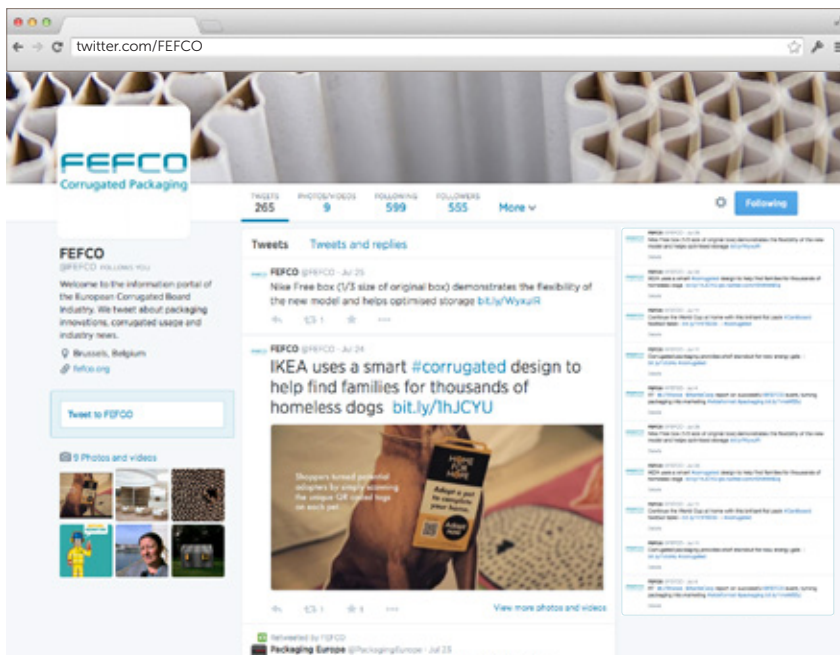
to the European Parliament, this has not significantly changed the political balance at European level. Martin Schultz continues as a European Parliament President for the next 2.5 half years.

The next five year term of the new EU Commission is expected to start on 1 November 2014. Political leaders have already initiated discussions and nominations for the high level European positions. The new President is Jean-Claude Juncker, elected by the Parliament on 15 July 2014.

On 1 July 2014, Italy took over the presidency of the EU Council for a period of six months and will be followed by Latvia and Luxembourg. According to the 18 month Council programme: "Fostering industrial competitiveness will be at the centre of the three Presidencies' activities, including ensuring a further integration of the Single Market, development of industrial cooperation and improving the overall business environment for European companies."

With this changing political and regulatory environment, FEFCO is actively following those topics which are of importance for its members. The main focus in the coming months will be on the circular economy package, with the revision of waste targets and developments with regards to food contact.

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Events

Next FEFCO Technical Seminar 2015
Preliminary dates: 28-29-30 October 2015
Venue to be confirmed

Other Events

Eurasia Packaging 2014
18-21 September 2014
Istanbul Packaging Industry Fair
Istanbul
www.packagingfair.com

MACFRUT
24-26 September 2014
Cesena Italy
www.macfrut.com

Verpackung Austria Vienna
24-25 September 2014
Vienna, Austria
www.easyfairs.com

CPP Expo 2014
Converting and Packaging Printing Expo
28 September-1 October 2014
McCormick Place, Chicago.
www.cppexpo.com

Packaging Innovations London/Luxury Packaging
30 September-1 October 2014
Business Design Centre, London, UK
www.easyfairs.com

PPMA Show
30 September-2 October 2014
Hall 5, NEC Birmingham
www.ppmashow.co.uk

Macropak 2014
30 September-3 October 2014
Jaarbeurs Utrecht Netherlands
www.macropak.nl

Luxe Pack Monaco 2014
27-29 October 2014
Grimaldi Forum, Monaco
www.luxepack.com

FEFCO

250 avenue Louise 1050 Brussels
Tel: +32 2 646 4070 Fax: +32 2 646 6460
E-mail: info@fefco.org
Twitter @FEFCO

www.fefco.org