



Boxing the Future

FEFCO Summit, Barcelona

21-23 April 2010



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Alexander Enzenberg
Chairman Communication
Committee

Edito

Dear Members,

As Chairman of the Communication Committee I am pleased to announce the dates of the next FEFCO Summit. This unique event, taking place **21- 23 April 2010 at the Grand Marina Hotel in Barcelona**, is a merge of the FEFCO Congress and the Marketing Congress. Please note the date!

Why Barcelona? Because, as an economic, cultural hub, it has excellent conference facilities, many corrugated plants are located nearby and it is easily accessible from anywhere in Europe.

The Communication Committee has started to put together a programme targeted at both CEO's and sales and marketing directors from the Corrugated Board Industry.

In today's demanding business environment there are many topics to interest industry leaders but we will mainly focus on concrete business and market issues. Of course, themes like sustainability and leadership will also be featured. Experienced industry speakers will take a deeper look at the economic situation and analyse the effects of the crisis suggesting ways to help us consolidate our foundations for the future.

The Summit theme, **"Boxing the Future"**, is just to remind us that our industry has always been and will remain assertive and "punchy!"

We are confident that this forward looking programme will attract delegates from all over Europe, and under the guidance of the FEFCO Board, we will ensure that its content is at once interesting and relevant.

We feel sure that we can count on your enthusiastic support, and look forward to greeting you in Barcelona in April 2010.



Announcement: 1st FEFCO Summit Barcelona, 21-23 April 2010

**Don't miss the first FEFCO Summit!
Book the dates in your agenda now!**

The FEFCO Communication Committee is pleased to present more details on "Boxing the Future", an important FEFCO event scheduled to take place in Barcelona in 2010.

The new event concept is built with you in mind, and aims to:

- give insight into topics of direct relevance to your business
- provide the corrugated industry with the latest information on market trends
- re-state and reinforce our industry's ongoing messages
- hear and share current best practices and lay foundations for the future
- encourage and facilitate networking and discussions with industry colleagues from all over Europe!

Practical information

Venue

Eurostars Grand Marina Hotel
Moll de Barcelona, s/n - West Building
08039 Barcelona
Tel.: (+34) 93 603 90 00

What you need to know about Hotel Registrations

In a couple of weeks, in order to secure your hotel rate, you will be given the opportunity to book your room at a special FEFCO rate. However, in order to give you more flexibility, now you will have the option of cancelling your reservation up to one month prior to the event. FEFCO's rate will include VAT and breakfast, making it difficult to find a cheaper alternative (even though in today's competitive environment, it is sometimes possible to find cheaper rates under certain conditions...)

Content

A draft programme will soon be available on FEFCO's web site. You will be personally informed by e-mail and be able to register on line. Printed invitations will be sent out once the content of the programme is finalised early next year.

A new fee policy

FEFCO Communication Committee is revising the attendance fee policy and will unveil a number of attractive rates in order to encourage everyone within the target audience to attend.

Contact & sponsorship opportunities

To ensure that you get all the up-to-date Summit information, or if you are interested in sponsoring this event, please contact Nathalie Schneegans: nschneegans@fefco.org

CITPA's New Web Site

www.citpa-europe.org

The International Confederation of Paper and Board Converters in Europe (CITPA) has revamped its website adding all manners of useful and interesting information: www.citpa-europe.org

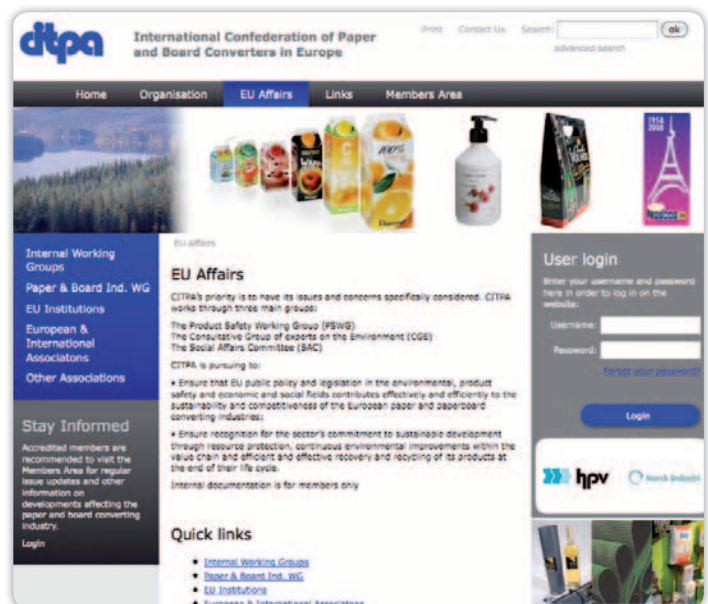
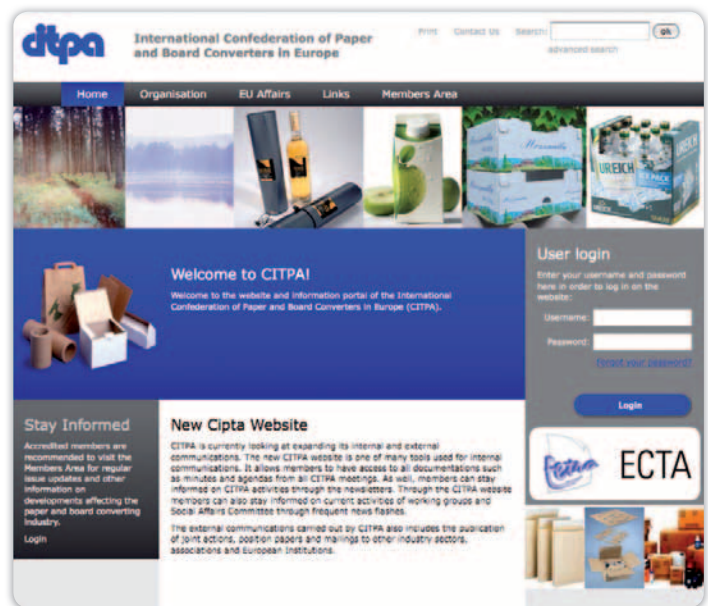
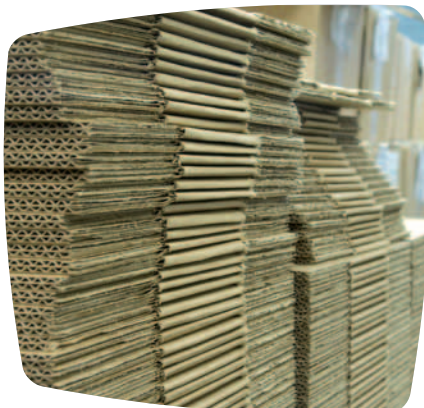
This new information portal now provides its members with the latest information on CITPA's activities and gives access to all the useful links within the paper converting industry.

Suscribers can access the members area to get updates and the latest information on developments affecting the Paper and Board Converting Industry.

The site also provides all the recent working documents of every CITPA Committees, as well as agendas and minutes of all meetings. In addition, it give access to useful documents from the EU Institutions that are not always easy to find in the jungle of EU bodies web sites.

CITPA newsletters summarising the latest EU issues are now available for download.

For more information or to obtain a password, please contact María Casado:
Tel + 32 626 98 36
www.citpa-europe.org





Corrugated Sector Defies Crisis

Overall shipment results for the Corrugated Board sector in Europe show a downturn at close of 2008, figures in square metres give a 2.4 percent decrease compared to the previous year, and in tonnage the drop is 3.2 percent.

Where overall volume results are concerned neither the impact of the various developments to have taken place over the year nor country by country differences are reflected in the figure. As for tonnage, after analysis of the outcome sharp divergences are apparent.

Turkey was the only country to finish 2008 with a positive return, followed by Austria, Poland and Germany who were "next best in class" closing the year with results at around the zero mark. With the exception of Norway the poorest rankings were noted

in Scandinavia, the Czech Republic, and southern European countries, namely Spain which ended down 4,82%.

What else do we learn from the annual statistics now provided at FEFCO's website? (download is available in the publications/statistics section of the FEFCO web site www.fefco.org). The total number of companies producing corrugated board packaging decreased by 5,4% whereas the number of plants by only 2,4%. This reflects the ongoing consolidation process in the industry. Meanwhile sheet production continues to be stable at a percentage of 22.

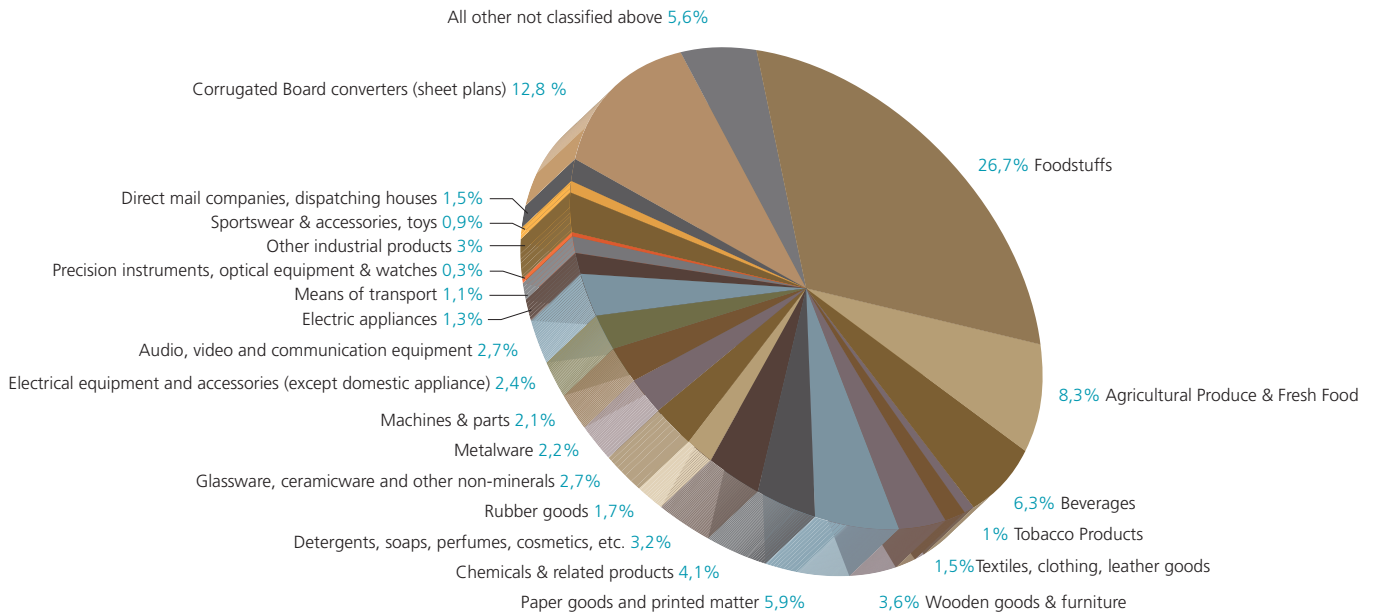
Considering the current difficult times, the total number of personnel remains relatively stable with a drop of 1,5% or 1 323 fewer people employed Europe-wide. Clever working models with flexible time schemes have contributed towards reducing the impact of the crisis on the employment situation in our industry.

The year 2009 continues in a climate of considerable uncertainty and volume decreases of double-digits. But it does seem that the economy as a whole is showing signs of recovery. Since our industry is accustomed to being closely linked to GDP growth, there is reason to hope that the recession will be overcome in the near future.

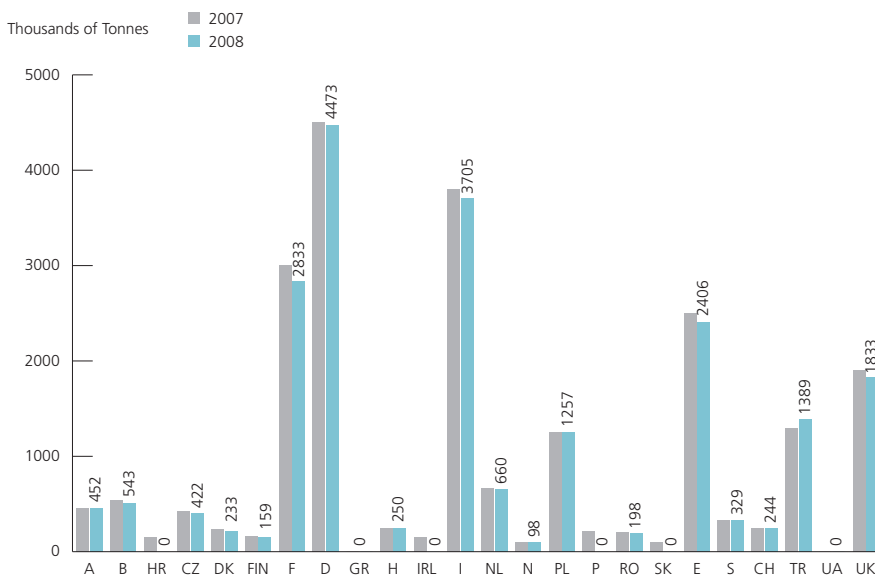




Classification of shipments by end-use sector, as a percentage of turnover 2008



Shipments in '000 Tonnes



For more information, please contact Angelika Christ:
angelika.christ@fefco.org



How to Decide - Corrugated or RPC's ?

What makes a retailer choose between corrugated board and reusable plastic crates for the secondary and tertiary packaging of food products – what are the drivers? In order to understand how such decisions are made, the Belgian and Dutch corrugated board associations decided to ask the Vlerick Management School to conduct a research project, and a series of in-depth interviews with retailers and suppliers and branch organisations were conducted in Belgium and in the Netherlands.

The results of the study underline the importance of communicating the advantages of corrugated packaging, and its role in meeting the challenges and eliminating the bottlenecks experienced by the retailers throughout their distribution and supply chains. Packaging is a necessity but the choice of packaging is crucial. However, a number of parameters - such as cost, convenience and ease of handling, through to marketing and protection - are all taken into consideration before deciding which form of packaging to use. In addition to these aspects, every retailer has personal parameters and priorities, mainly influenced by company strategy and market positioning. The study confirmed that the trend in shelf ready packaging is one of the major opportunities for the corrugated industry.

The researchers made some recommendations for the corrugated industry. They saw that the same arguments

- sustainability and environmental friendliness - were used to justify the choice of both corrugated and RPC's. They concluded that the corrugated industry has to solve the misconceptions concerning the environmental impact of its material. Although it is fundamentally clear that corrugated is environmental friendly, a lot of the key players in retailing did not recognise this fact. The study confirms the importance of sustainability for the retailers, and 'environment' is still today's buzzword. The industry must use this mindset in order to gain credibility and improve B2B communication.

The report also concluded that the corrugated industry must achieve a better understanding of its competitors and of the needs of the distribution and logistic players in the market, through regular contact with the retailers. Further, the corrugated industry should continue to innovate, and to take advantage of the advances in RFID technology. A great deal of work is going on to improve RFID tags and to reduce the unit cost, and it is clear that in the near future this technology will have a role to play in the choice of packaging materials.

Value creation from the use of corrugated board is very important, and here again regular contact with the retailers and their suppliers will help to emphasise this. Last, but by no means least, the industry must constantly work at standardisation and on the common footprint, but must also be



continually focused on cost reductions.

On the basis of this report the Belgian and Dutch associations are preparing a three-year action plan for the Benelux area.

For more information please contact Lieve Vanlierde (FETRA): lieve.vanlierde@fetra.be or Toon Schrijver (Vereniging Golfkarton): toon.schrijver@golfkarton.org

NADS and Country Activities

Germany - VDW



“Sustainable Development - with Corrugated Naturally” was the title of the latest “Corrugated Forum” put together by the German Corrugated Packaging Association (VDW).

The event took place at Nürnberg during the international packaging fair “FachPack” on 30th September 2009.

President of VDW Norbert Julius welcomed the participants and spoke of the many benefits of packaging made from a renewable resource, as well as the specific advantages of corrugated packaging. Following this introduction, Dirk Maxeiner, journalist and author of the best selling “Encyclopaedia of Eco-Myths and Misconceptions” gave a speech on “the Reuse Myth and Other Ecological Misconceptions”. Finally, Professor Dr. Matthias Franz from the Stuttgart Media University (HdM) demonstrated the importance of sustainable packaging for retailers and consumers.

For more information, please contact Martin Petrich:
petrich@vdw-da.de
Tel. + 49 6151 / 9294-23

France / ONDEF

On 1st September, Olivier Draullette, former Business Development Director at ONDEF left the French Association to become the Secretary General of SNFBM (the French Association of Metallic Tins, Cans and Closure Lids). We wish him all the best in his new career.

Report from Spain



Corrugated packaging use saves 40% CO2 emissions

A study released by professors from the University of Navarra (IESE) has analysed the economic and ecological impact of different transport packaging options.

The experts argued that for each equivalent production unit, the corrugated cardboard packaging industry emits roughly half (59%) the amount of CO2 as the reusable plastic crates industry. Put another way, corrugated packaging “saves” 40% of CO2 emissions.

The current trend is undoubtedly towards measures for more sustainability. The European Union, the U.N. and the Spanish government have each approved a CO2 reduction plan, and for that reason, Professor Pedro Videla argued that corrugated packaging is the obvious choice, because it generates less CO2 emissions and in addition it has a better impact in terms of employment.

Using only plastic crates, the annual CO2 emissions would increase by 620 000 tonnes, the equivalent of an increase in the number of cars in circulation of 365 000 vehicles. On the other hand, the substitution of plastic crates by corrugated packaging would allow an annual reduction of the CO2 emission equivalent to the withdrawal of 78 500 cars from circulation.

For more information please contact Professor Pedro Videla (IESE).

Finland



A new Chairwomen for the Finnish Corrugated Association

Ms Sari Rämö, Managing Director of SCA Packaging Finland Oy has been appointed Chairman of the Finnish Corrugated Board Association.

For more information, please contact Eija Jokela, Secretary General of the Finnish Association:
eija.jokela@aaltopahvi.fi
Tel. + 358 20 744 8990.

UK



A new Chairman for CPI Corrugated sector

As of 18th September 2009, Mr. Clive Bowers, Chief Executive Officer of Smurfit Kappa UK, Corrugated Division, will represent CPI at future FEFCO Board meetings.

Corrugated Parliamentary Reception 2009

The CPI will once again be holding a Corrugated Parliamentary Reception at the House of Commons on 4th November. On behalf of its Members, CPI has written to MPs with corrugated plants within their constituencies. Owing to the development of a new database, CPI was able to tailor each invitation by highlighting individual Member corrugated plants within each constituency. As a result, the response to date has been very positive – even at this early date, over 25 MPs and several prospective candidates have confirmed their attendance.

“Making waves with corrugated industry seminar”

CPI did organise a seminar to inform Members about the emerging trends in packaging, specific promotional messages and other projects that have been developed in response. Attendance will educate and inform colleagues in their discussions with customers. ‘Making Waves with Corrugated’ will take place on Tuesday 15th September 2009 at the Holiday Inn, Stratford-upon-Avon.

Sponsorship of National Awards

CPI is supporting The Grocer magazine Advertising and Marketing Awards (GRAMIA) and is sponsoring a new award in 2009, the “Integrated Marketing Award”. Through this sponsorship and an associated approach to Marketing & Design media, CPI is seeking to position corrugated as a marketing tool.

For more information, please contact Andrew Barnetson, Corrugated Sector manager, CPI. Tel: +44 (0) 7775 771662

FEFCO Activities



Update on FEFCO campaign brochures

New brochure “Printed Packaging-effortless one to one advertising”

Find out how printed packaging pays off, for retailers as well as packers/fillers!

This document

summarises the most remarkable advantages of printed corrugated packaging. Just to name a few - its fantastic ability to act as a silent salesman - its powerful attraction for consumers - and finally its ability to help retailers both to optimise storage facilities as well as maximise on shelf promotion. German and Turkish translations will be available soon.

For your information, the English version of this document can be downloaded from www.fefco.org. Simply go to the FEFCO's home page

FEFCO 2008 Statistics

The annual statistics are now available in the member's only section of FEFCO's web site. For your information, monthly statistics are also available in the same section of the web site. www.fefco.org

Meeting with Technical Seminar exhibitors 3rd September 2009, Berlin.

Sympathiser members who exhibited at the last FEFCO Technical Seminar in Germany

have participated in a debriefing with the FEFCO Production Committee in charge of this event. The discussions were very fruitful, covering a number of new ideas brought forward by the exhibition participants. Mr Walter De Smedt, Chairman of the Committee gave his thanks to the FEFCO industry suppliers and assured them that the FEFCO Production Committee will do its best to incorporate all these suggestions into the programme of the next Technical Seminar, which should take place in 2011.

Announcements

New Chairman for S3 Committee

Roberto Villaquiran, Smurfit Kappa Group, will take over leadership of the S3 Committee as Paul Brown, his predecessor, has left Europe for a new assignment within International Paper. We know he can look forward to the full support of all the members and we thank Paul Brown for all the work he has done for FEFCO over past years.

CITPA Announcement

María Casado has been appointed **Secretary General** of CITPA. A new Board of Directors has also been appointed for a 2 year period. www.citpa-europe.org

Events

FEFCO Summit

This summit is a merger between the FEFCO and the Marketing Congress
21–23 April 2010
Barcelona, Spain
www.fefco.org

Industry Events

FachPack 09

29 September – 1 October 2009
Nuremberg, Germany
www.fachpack.de

European Paper Week 2009

Building on Paper Value
17-19 November 2009 in the Marivaux Hotel and Conference Centre in Brussels
Registration: www.cepi.org/epw

Other Events

Empack 2009

7-8 October 2009
Brussels Expo, Brussels, Belgium
www.easyFairs.com/empack-be

Luxe Pack Monaco

20-23 October 2009
Grimaldi Forum, Monaco
www.luxepack.com

Scanpack 2009

20-23 October 2009
Swedish Exhibition & Congress Centre, Goteborg, Sweden
<http://nemonet.swefair.se>

CIBUS TEC 2009

27-30 October 2009
Fiere di Parma, Parma, Italy

IPACK 24th International Packaging & Food Processing Systems Exhibition

2-5 December 2009
CNR Expo, Istanbul, Turkey

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