

Produced by the European Federation of Corrugated Board Manufacturers



Picture your future

We review our 'best ever' Marketing Congress in eight pages of expert views on how to be profitable and succeed in a 'sustainable' world...

See who made an exhibition of themselves in Athens (in a good cause)...

SPONSORS

AISAKOS S.A.



ΕΛΛΗΝΙΚΟΣ ΣΥΝΔΕΣΜΟΣ ΚΑΤΑΚΤΗΡΙΑΣΤΩΝ
ΚΥΜΑΤΟΒΛΩΣΤΩΝ ΧΑΡΤΟΝΙΟΥ & ΧΑΡΤΟΚΙΒΩΤΩΝ
Hellenic Association of Corrugated Board
and Packaging Manufacturers
Greek Corrugated Association



Strategies to help sustain your business... [pages 2-9](#)



A rich menu included entertaining dinner theatre [page 7](#)



Read our first report on the biggest European project for the corrugated industry: Modelpack... [page 10](#)



ANGELIKA CHRIST
SECRETARY GENERAL, FEFCO
angelika.christ@fefco.org

Editorial

Athens certainly lived up to expectations as an inspiring setting for a memorable 17th Marketing Congress addressing the theme: To the store, in the store, corrugated works. We came away with valuable information shared by speakers with huge experience and knowledge to give added momentum and yet sharper focus to our business activities. Delegates rated this among the best FEFCO congress events and we warmly thank an indefatigable communications committee chaired by Imre Hopka and managed by Nathalie Schneegans.

To stay in business and successful whatever your industry seems to get more difficult over time. There's competition at your shoulder, just like you, trying to do the best for customers; pressures from below, from individual consumers and consumer organisations, and from above, from European legislative bodies and national regulation enforcement agencies. FEFCO and its country members exist to relieve some of that pressure by boosting the industry's profile and ensuring it stays competitive. But what active steps can individual enterprises take?

Our guest marketing experts in Athens - reviewed on pages 4 and 6 - advised companies to offer high value propositions to each of their customers whether through a low cost model or a full service option.

We heard much about innovation, a "life-line" for businesses according to our trends reporter at Athens (page 9). In driving terms, to avoid a traffic jam and discover an empty open road you might listen to the radio. In industry terms, you should "listen" to your market, heed trends and innovate. For example, Italian corrugated industry consortium Bestack is exploring new routes to market summarised on page 3.

Also in this issue we are pleased to report for the first time on Modelpack (page 10), the industry's biggest-ever European project to create software to increase the competitiveness of smaller producers.

Athens: birthplace of democracy, Western philosophy, literature and drama, political science and major scientific principles, the Olympic games – and an inspiring setting for our 2007 Marketing Congress on strategies to sell our brand message to a 'sustainable' world: To the store, in the store: corrugated works.

Opening the two-day event FEFCO president Dermot Smurfit began by introducing a presentation that explored the status and issues relevant to the corrugated industry in our host country.

Greeks watch their weight

Locally owned firms in Greece need robust strategies to help them compete in Europe said Thomas Sefertzis, honorary president of the Hellenic Association, in an overview of the Greek corrugated market.

Greece - on the southern edge of the Balkan Peninsular with 11 million people – sees GDP growing at 4%, which was recently revised upwards by 25.5% up to €250m to account for a significant black market economy. But the manufacturing industry is stagnant, or growing slowly, says Sefertzis. Greece is expensive for labour with a 3.5% consumer inflation rate. It owes its growth mainly to shipping and tourism.

"Consumer credit is something new in Greece and boosting economy," notes Sefertzis, but

structural improvement is needed in public finance to deal with pension issues in an ageing population with a low birth rate.

In 2006 the corrugated market had an estimated turnover of €215m and produced around 270,000 tonnes – with 3.7% average yearly turnover growth during the period 2000-2006. Supply of corrugated packaging is fragmented - 12 companies operate 14 box plants with five of them linked to paper mills. With more than 20 mostly small sheet plants, nationally it is a crowded sector in which three new green-field plants since 2000 have further changed the balance of supply.

According to Sefertzis, the industry needs to improve marketing and sales effort and get away from price-focused competition. In the Greek market the average price per square metre in comparable products can be 20% lower than average European prices. Where sales are calculated on price per tonne, in the light of a European industry move to lower grammages, it is an issue Greek companies need to tackle.

One message, one voice

FEFCO's S3 Corrugated Packaging Initiative is devoted to marketing the goodness of corrugated highlighting the value it gives in

safety, sustainability and savings. Paul Brown, chairman of the S3 committee and International Paper vice president, European container division, based in Brussels.

Some segments have seen a decline in growth rates of corrugated packaging such as in fruit and vegetables, in addition to which substitutes systems are being introduced by retailers in beverages, fresh food of different types, dairy and processed foods, to display and transport to market.

Paul Brown (pictured) went on to report that FEFCO's S3 team is continuing to develop a

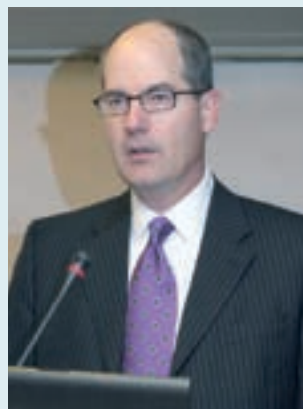
common consistent industry message telling the true environmental story behind corrugated to inform retail decision-makers in Europe:

that message is "Corrugated serves retailers' needs".

To speak with one voice at a higher level and a European approach are important because European legislation impacts on waste management, hygiene, consumer protection and traceability, where corrugated also can offer advantages.

FEFCO's new retail packaging director Gudren

Klopfer is managing the initiative and Angelika Christ is bringing newfound energy to this effort says Brown.



Paul Brown

Efforts are bearing fruit in South European markets



Faced with green islands of plastic crates appearing in their supermarkets Italian corrugated packaging producers are acting to offer retailers greener solutions

Consorzio Bestack is taking positive action to consolidate the needs of retailers and logistics in its corrugated systems says Claudio Dall'Agata, of Bestack.

In the Italian retail market, fruit and vegetable production is growing healthily and corrugated systems continue to show strength, particularly in export markets. However corrugated packaging consumption saw a drop, from 14.5 million to 13 million tonnes in the period to 2006.

Central buying offices (CBOs) are increasing their power in Italy says Dall'Agata. In 2006 the concentration of their business went up to 98% for the top six CBOs. In 2007 one of them closed, further to strengthen the buying power of the others including Coop Sigma, Conad-Rewe and Carrefour.

In the Italian market the cutting back in the use of wood packaging reflects the squeeze on the street vendors' market by supermar-

kets. Substitute materials are increasing in the wholesale market where corrugated sales remain substantially unaltered thanks to export market and local retailer support.

Corrugated tops the materials league in Italy for the first time

Estimated 2006 figures show in total 500 million fruit and vegetable boxes (all materials) were used for export, 450 million for supermarket retail, and street vendors and green-grocers combined used in excess of 550 million. Estimates for the different types of product show corrugated just ahead of wood and for the first time at the top the materials league.

Bestack is acting positively with a plan to design a product not just for fruit and vegetables but also for wet products, to give producers a packaging option that is flexible. To further increase competitiveness Dall'Agata urges our industry to promote the logistics standard footprint and "take advantage of new logistics solutions".

With this aim in mind Bestack is already in a project with two Italian retailers.



Corrugated systems can meet the different needs of retailers and logistics

Spanish allies display teamwork

Collaborations with industry supply chain partners and allies in associated sectors can be successful strategies according to our Spanish member AFCO which reported on its recent experiences and bold plans.

What started as competition for corrugated in the fruit



Patricia Vallejo-Nágera

and vegetable sector in southern Europe has spread northwards and to additional retail product categories. AFCO's José Cabrera and Patricia Vallejo-Nágera (pictured) are leading a project to "change perceptions" about paper and board, to defend the sustainability and highlight the profit potential of corrugated systems.

AFCO has joined paper and pulp associations, editors, publishers, printers in a "paper forum" to send positive messages out to schools, academia and business about sustainable forest management and manufacturing processes, collection and recycling and sustainability of paper products.

Efforts such as this are worthwhile because the corrugated industry is important in the Spanish economy and its sustainability, adds Cabrera.

And to "earn the trust" of corrugated consumers AFCO is involved in the adaptation of a logistics software tool provided by FEFCO to calculate environmental and economic savings of corrugated systems.

AFCO is retailer focused

A project with a major food retail group in Spain has studied internal flows of packaging, which has aroused interest from other retailers. It resulted in a set of useful general guidelines which can be found in a best practice manual.

In addition, AFCO has produced dedicated box designs for fresh poultry and fish. The retailer in the original study has asked its poultry suppliers at national level to pack in the poultry box and is expected to make a similar call before the end of the year to its fish suppliers to use the fish box.

Realise your value says top marketing expert

“Cutting costs is not a strategy; it’s butchery”

Professor Frédéric Fréry



“Create a value that’s beyond your costs,” says Professor Frédéric Fréry, European School of Management

To get ahead of the competition, let proven laws of value-driven innovation govern your business strategies, Professor Frédéric Fréry, of the European School of Management, told delegates.

Prof. Fréry (pictured) showed how even the biggest brands, by not following good practices in value innovation, have missed opportunities and allowed newcomers to find a foothold in their markets.

The way a company can work to achieve long-term profits says Prof. Fréry is to “create a value that’s beyond your costs”; in other words, don’t fix the price, set the price a consumer is willing to pay.

Successful tried and tested strategies include market segmentation and selling customers solutions rather than products.

Does cost cutting increase profits or guarantee higher margins? No, says Prof. Fréry firmly: “Cutting costs is not a strategy; it’s butchery”.

“Creativity comes from constraint”

His examples of clever value-driven thinking include the use of plastics in the shell of a cell phone which visually mimics metal but is meant to feel like skin. And in the car industry a feature that looks and sounds like wood can increase the value of the option even if it is plastic.

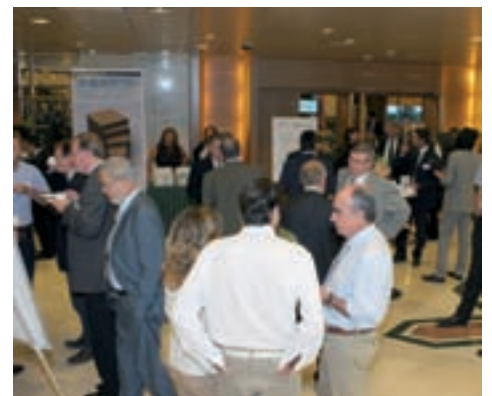
Coca-Cola’s success relies on the fact that consumers will buy a brand not a product.

For higher profits big name brands have de-commoditised everything from ice cream to cement.

Value-driven companies allocate resources according to profitability and are prepared to turn less profitable business away.

Intel, Tetra Pak and Dupont with the Lycra brand, all successfully have used advertising to the end-user to stretch profits margins. Nike created a new market by selling sneakers not for sport but for street wear and challenged German Adidas and Puma to up their game. Prof. Fréry’s favourite marketing “truths” for sustainable success also include, “creativity comes from constraint”, “perfection is not profitable” and “it can be dangerous to listen to customers - listen to customers and you can kill the business very rapidly”. He expands the idea saying, listen instead to the market and keep eyes open for unexpected uses of your product because these are the sources of innovation.

And to complete this extremely well received talk – go for “evolution not revolution” because people are afraid of something that changes everything.



Talking points: Coffee-break time was a perfect opportunity to share views on ‘hot topics’ of the day addressed by a line-up of engaging speakers

High costs will stall Henkel's SRP plans

"Even Henkel can't keep its name on the shelf without SRP"

Sebastian Schauten,
corporate manager purchasing, Henkel

Henkel owns Persil and Schwartzkopf among 650 household and personal care brands in daily use around the world with sales reaching close to €13,000m. Packaging trends as seen by a big customer of the corrugated industry were discussed by Petar Stjepanovic, purchasing manager for Henkel Central Eastern Europe based in Vienna, Austria and Sebastian Schauten, corporate manager purchasing, from Düsseldorf, Germany.

It is important to make global decisions that link to local and regional markets believes Henkel

Henkel looks for the right market conditions before launching the global company on the wave of a new packaging trend and prepares for change to get the best additional value from new systems while keeping the costs down.

Henkel spends significant amounts globally on corrugated packaging and it is important purchasing managers to be organised to work in such a way as to make global decisions that link to local and regional markets.

Customer and end-customer demands, costs and availability of latest print and production technology by its printed packaging suppliers, are some of the factors that dictate the speed of Henkel's uptake of new packaging systems. For example, to simplify management of shelf-ready packaging (SRP) and ease logistic processes the company has decided to allow purchasing teams only to buy pre-selected types of SRP.

According to Stjepanovic the purchasing reality of SRP is "exploding" raw material prices, shortages in paper, corrugated and print-



Two speakers from Henkel - a big user of corrugated - talked about company concerns over the cost and complexity of introducing SRP systems across its many brands around the world

ing opportunities, complexity and handling issues.

Mainly due to cost Henkel is stalling SRP entry plans for a while and will aim to keep the percentage of SRP "as low as possible".

Germany is ahead of other Henkel markets where a move towards SRP started four to five

years ago and now 94% of the company's detergent and cleaner sales are in SRP, 2 and 3-colour boxes with perforated strips.

Schauten stated that sometimes suppliers can only get access to retailer listings in SRP and "even Henkel can't keep its name on the shelf without SRP".

Data-driven keeps you in the driving seat

Be data driven,
assumption light says
Professor Nirmalya Kumar



Retail suppliers enjoy minimal benefits because whoever wields the power gets the cash. So delegates listened hard to Professor Nirmalya Kumar, of London Business School and former Visiting Professor of Marketing at Harvard Business School, looking at new ways of thinking about what matters to customers, to give them all they want - except unnecessary price concessions.

Today, companies face a lot of price competition and low cost business models abound - Ikea and Easyjet spring to mind. And to rise to the challenge, says Prof. Kumar (pictured), the marketing focus has to shift beyond price to value. This entails defining your market; understanding your competitive advantage and

the value of what you offer; and accepting where you won't make money. Because "no matter how good we are, we can't add superior value for everybody" says Prof. Kumar. And "don't just fight on price": sell on the basis of value in monetary terms, documented and guaranteed, compared to the next-best alternative from a customer perspective. Documentation must be data driven, assumption light and your concrete examples of lower costing should be verified. In business-to-business marketing, a company will sell to the same customers over and over again and must demonstrate results.

A procurement cost-cutting mandate can lead to pressure on a supplier to drop prices. The

supplier needs to show cost saving by other means says Prof. Kumar. To be calculated are the acquisition costs such as time spent evaluating, shopping, administrating, travelling. Taxes and insurance and storage must be paid in addition to parts and spares, training, labour and, eventually, disposal.

"We have to promise to minimise the sum of all of these, not the price."

Another strategy is to force customers to pay extra for the service-level they want. Put simply, in terms of individual consumption, a petrol tanker can deliver in bulk to your doorstep or you can buy petrol wherever and whenever you need it: this is the kind of choice a company can offer its customers.

Corrugated in fashion and art...

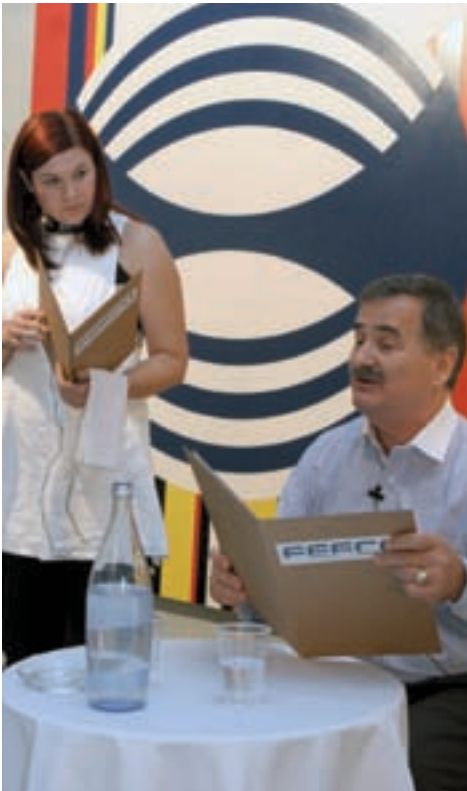


Stunning models fresh from a fashion show and catwalk event in Switzerland arrived from the aptly named Swiss-based European group Model (pictured above) to be part of a special FEFCO exhibition with a creative corrugated theme. Three-dimensional exhibits of fabulous corrugated paper dresses were extraordinary examples of our favourite material's flexible

characteristics. Unfortunately the full-size, real-life models in wearable versions of the same outfit designs were unable to join us in Athens! Creativity at work was the theme of an exhibit that SCA Packaging Austria brought to Athens (pictured right). In addition, a poster told the story of how the joy of colour and hope symbolised in images of butterflies are able to help spirits to soar. A worthy cause - a charity that supports parents through the experience of stillbirth - benefited from this SCA project. And finally, before our very eyes came ideas for fantastical furniture made from corrugated: an intricate chair design, a practicable table and other usable and decorative artifacts were presented by Smurfit Kappa Wellpappe Feucht in 2D and 3D. The company's Art at Work poster series (pictured, page 7) and freestanding exhibits with the contributions of Model and SCA, added up to a superb backdrop to our social events.



Dunapack stars in a show!



Zsófia Szélig, sales representative and Gyozo D'érényi, head of the key account department of Dunapack, Hungary

Here is a little taste of the fun two actors had with their "play on words" produced specially for an audience of off-duty boxmakers in Athens, home of Greek drama. This delightful piece of dinner theatre found the funny side of modern marketing in the industry. You can go to the FEFCO website for the entire playlet script. But as they say, "You really had to be there!"

Guest

Is this the FEF & Co. Restaurant?

Waitress

Yes. Actually, you are our very first guest.

Guest

So, I am a pilot project for you!

Waitress

We only open during the FEFCO Marketing Congress. You know, box makers are special people! I like them! They are always optimistic! Sometimes even without reason!

Guest

Let me see your menu card. It's a nice colour, nice brown.

Waitress

It's a green product!

Guest

Green? I think it is brown!

Waitress

At FEFCO, the brown is green! Green is brown! You understand? ... and for the food, you pay nothing! You only pay for the extras. If you ask me to bring your food to your table, it will cost you €5 more...

By the way, have you brought plate and cutlery with you? Not? Never mind, in this case, leasing fee for plate and cutlery and glass makes another €5 extra. Do you want me to smile? It is free of charge today!

Guest

So, the food is free of charge and the extra services are as much as the food price! Very tricky, very wise!

... and at work



Photo: Julia Leicht and Thomas Piwonka

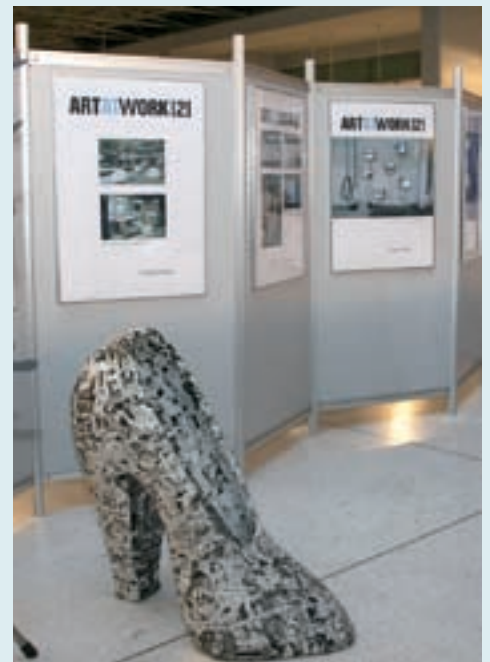


Photo : Michael Schells, www.jetztkunst.de

Shelf-ready pulling together will make it work

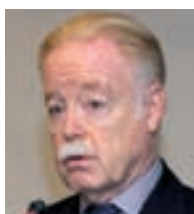


UK and French perspectives on the retail case for shelf-ready packaging, and the need to heed calls for sustainable systems, came from Andrew Barnetson and Olivier Labasse, respectively members of ECR UK and ECR France.

UK shoppers in 2006 spent 12.7% of their income on groceries – totalling €188bn, of which 73% was taken at the checkouts of supermarkets mostly controlled by five retailers: “So you can’t ignore their requirements,” says Andrew Barnetson.

Retailers in the UK and France are mainly interested in “getting the right product to the right place to the customer when they want it” and believe the last 50-100 metres to the shelf is where potential is for real savings.

Olivier Labasse says French hypermarkets carry as many as 20,000 lines of goods and employ 600-800 staff and up to 25% of them



Olivier Labasse,
ECR France

will be required each to manage and fill around 700 product lines a day, taking up to two hours. Easier product identification in back of store can increase productivity of shelf-fillers but only if staff get trained to use - and are seen to use - SRP properly, states Labasse.

Industry standards demand SRP is functional throughout the supply chain, from where it is packed with goods to point of purchase. In addition, calls for SRP to be “sustainable” come from European legislators and active, green consumers. For continued growth and support of SRP, Labasse warns that claims of its sustainability must stand up.

Shaping up the system

Carrefour is targeting SRP integration of more than 50% of volume overall, with close to 100% of private label products and around 50% of branded products in SRP. Lydie Ficheux, ready-to-sell project coordinator, Supply Chain Group, said this will apply to all food categories depending on sales volume and shelf refilling complexity, and also some non-foods.

Carrefour believes a cross-functional approach to SRP will best fulfil the different demands of merchandise, the supply chain and operations. And a multinational approach will enable consistency in SRP requirements within the Carrefour Group. The corrugated board industry should be involved in the process towards these goals, added Lydie Ficheux.

Carrefour is among the retailers working on shelf-dimension standards. Lydie Ficheux

said that in France “we give all our suppliers dimensions of shelves. We share the criteria before we develop the model. Carrefour would like to share more and more.” Some suppliers send SRP that does not fit the shelves so “we see a need to develop together”.

The company’s SRP teams are now developing the Belgium, Poland, Italy, Spain and Greece markets, and soon Turkey. Suppliers are being made aware of “exactly what Carrefour wants” including how many items go in a box for a hypermarket or supermarket.

Global retail supplier Henkel thinks Europe-wide standards will simplify SRP projects. Sebastian Schauten responsible for purchasing at Henkel, said: “We try in hard negotiations to find a common solution to shelf dimensions as well as pallet dimensions; but there have been countrywide agreements, not European. Work’s been done on rules for what SRP should look like but not a final fixed agreement on dimensions... Complexity doesn’t decrease if you have different packaging for each customer as well as each SKU (Stock Keeping Unit).”

Gain without pain in SRP challenge



Workshop sessions on marketing for profits were yet another highlight of a packed and varied programme. James Tupper (pictured left) from the retail supply chain research organisation IGD in the

UK addressed shelf-ready packaging design challenges. He tells us he was “delighted with the extent everyone got engaged”. They were able to identify common supply chain needs, to prioritise and found opportunities to do even better according to “pain and gain” parameters.

It was “really great”, said Tupper: the group realised there is a link between secondary and primary packaging, shelf dimensions and ease of shelf filling and shopping. Tupper has taken numerous suppliers on night shelf-filling excursions to understand the need to approach the design job differently.

The emotional pull of printed corrugated packaging was identified in a session led by Winfried Peters, SEA Public Relations, of Germany. Good marketing tools for corrugated include exemplary uses that effectively market the value of top European brands such as Nokia and Moet Champagne.

ECR organisations collaborate with retailers to improve the retail shopping experience. There is some debate about the precise definition of packaging systems variously referred to as “retail ready” and “shelf ready” in the UK and “ready to sell” in France; but the same five “easy to” functions must apply: that is, easy to identify back-store, to open, to put on shelf, to shop from and to dispose of.

The best examples of SRP remove barriers of language, avoid damage, save time and are cost efficient says Andrew Barnetson, of ECR UK. It has to complement the primary pack on shelf, be attractive when partly shopped and allow an item to be replaced by the shopper. And in distribution, there are factors such as temperature and time spent in transit and storage to consider.

Let's keep the world turning

«Innovation is a lifeline; differentiate or die.»



Per-Stefan Gersbro

“Innovation is a lifeline” and “without packaging the world would stop” said Per-Stefan Gersbro at the Swiss International Packaging Institute’s first FEFCO Congress, in a comprehensive round-up of retail and consumer trends.

“NGOs work for humanity, see packaging as waste, don’t think what it has done before”, first and foremost giving consumers safe food and pharmaceuticals and functioning products and striving to deliver “high value at low cost”.

Packaging represents 2-7% of total value of a product and the industry is worth €450bn globally with healthy growth in most materials sectors. According to Gersbro plastics is outperforming other materials and, although paper and board has been struggling,

corrugated is expected to reach 140 billion tonnes in 2011 with 12% growth in emerging markets such as China and eastern Europe.

With economic shifts and ecological challenges organisations must prepare for change. Most people in business think globalisation pressures will increase and cause fundamental change in the market with effects as strong as industrialisation 150 years ago. But protectionism is worse than globalisation in Gersbro’s opinion.

The old and new are emerging influential forces. WOOPies (well of older people) are a growing consumer group of over-65s. RFID will transform distribution and the shopping experience. Nanotechnologies will enhance

material properties and sensor technologies will advantage fresh produce supply chain management.

For consumers, health and wellness is top of the agenda, “and we want timesaving convenience. There is value put on what gives us pleasure. We want to feel good about what we are buying – but not at any price”.

What do retailers want? “Satisfied customers - and what helps them keep competitive, increase efficiency, and flexibility on the supplier side.”

The retailer is becoming a brand in itself. Marks and Spencer brings added value through innovation and differentiation in the marketing message and self-brands its entire stock.

Athens gets “best ever” reviews

Hailed as the best marketing event of the recent past, Athens exceeded even the Communication Committee’s own high expectations. This small but representative sample of the many positive reviews tells us that we will have to “raise the bar” in 2008 to beat our “personal best”. We are in the corrugated industry so clearly love a challenge and will not rest on our laurels!

Andis Skujeniaks, Stora Enso Packaging Bu Baltic States, Latvia: “This was the best from last three congresses where I have participated.”

Andrew Barnetson (speaker), Confederation of Paper Industries, UK: “Well organised and in a good location. Overall a great success.”

Bert Laurens, SCA Packaging Eerbeek, NL: “The event was very well organised in a beautiful setting with interesting speakers.”

Joost Simons, Smurfitkappa, NL: “Very good subjects, excellent speakers.”

Maroun El-Khoury, Easternpak, Saudi Arabia: “Good highlight on problems the industry is facing. Excellent presentation by Professor Frédéric Fréry.”

Zsofia Reka Szelig, Dunapack, Hungary: “It was great to talk about industry issues with different country’s box producers. It was helpful to see the whole situation of the market.

Anyone who missed it missed out on a superb learning, networking and social occasion. Be sure to join us between 18-20 June next year for the FEFCO Congress in another historic setting, the Czech Republic capital of Prague.



FEFCO News and Events

New tool of the trade



Modelpack will give companies an advanced quality prediction tool for packaging design and manufacturing thanks to a European project due to complete in December 2009.

FEFCO, as part of a European corrugated industry consortium, is participating on the development of a software tool to help small and medium-sized manufacturers provide risk-free solutions using recycled papers and a minimum level of material to silence accusations of "over-packaging".

Modelpack (www.modelpack.org) is the largest European research project ever embarked on for the corrugated board sector, part of the Sixth Framework Programme of the European Commission, with a total budget of around €2.5m. A major objective is to support the competitiveness of Europe's smaller manufacturers. For this, selected SMEs are participating to ensure the goal is reached. Cartonajes Santorromán, Enico Group and Ondupack from Spain and Innovawood, of Ireland, are project partners with Francisco Vento (Spain) and PAKA (Germany), University of Thessaloniki (Greece), Universidad Complutense de Madrid (Spain), STFI-Packforsk (Sweden), COBRO (Poland), HEPI and HARTEL (Greece), AIDIMA (Spain) and FEFCO.

The use of recycled fibres in the manufacturing of containerboard grows every year and the call to cut down material volume in packaging must be answered to help meet European environmental policy goals.

These are positive moves for consumers of corrugated board thanks to the potential to improve green credentials in retail and industrial supply chains. It is our job as manufacturers to help customers achieve all the possible benefits without making false economies.

It can be difficult to predict packaging properties of products made from recycled papers due to sometimes variable paper properties and the need to switch between packaging papers and suppliers. The software tool will predict the structural properties of a corrugated board and the performance of the end product.

The 36-month project started December 2006 with an international survey of packaging papers and corrugated boards to create a database and will continue with the study of corrugated cases.

Acknowledgments. The MODELPACK consortium would like to thank the European Commission for providing the financial support to the project and the staff of all the partners involved in the work for their invaluable contribution.

Welcome to Gudrun



Gudrun Klopfer has become our retail packaging director at FEFCO, a new post we have created to put maximum effort into building strong relationships with retailers across Europe to raise the profile of corrugated board in the retail industry.

Our S3 marketing initiative which Gudrun will manage, has a big part to play in bringing the goodness of corrugated to the attention of decision makers in the retail sector in Europe. A new campaign is going to start soon.

Gudrun has an excellent range of experience to bring to this very important job, which calls for high expectations and determination to succeed. She has worked for the Smurfit Kappa group and in the food sector with Campina and Müllermilch. In addition, her insight into the world of our plastics competitor from her days at the reusable plastic crate supplier IFCO, will also be exceedingly valuable.

FEFCO activities

► Production Committee: Brussels

Refreshed by the summer break, the Production Committee chaired by Walter De Smedt met at the end of August with a very busy agenda, at the FEFCO offices in Brussels.

The group evaluated the previous technical seminar and was able to clear and agree key objectives for the future.

The next meeting is planned for November.

► Standards Committee: Darmstadt

The Standards Committee met in Darmstadt at the invitation of VDW in September.

It is currently putting the final touches to the reports of two "round robin" tests - Bending Stiffness and COBB - which will be published on the FEFCO website.

Recently the Standards Committee exchanged ideas with the TAPPI Fiscotec committee and agreed to work on harmonising technical standards and test methods for the corrugated packaging industry.

Technical sheets on Flute Typology and Warp are also being prepared.

► LCA reference group: Brussels

With the carbon footprint issue heating up the industry's agenda, members of the Life Cycle Analysis (LCA) reference group met several times during the summer months.

FEFCO has always been a frontrunner in dealing with environmental matters and will continue to do so.

The LCA reference group - a joint committee between CEPI Containerboard and FEFCO - considered recent developments and discussed future approaches during a meeting in Brussels in September.

PRINTED ON

RiegerTop & RiegerTop DC



NEW

Printed and converted by Dunapack, Hungary on RiegerTop 180g. Machine: United - Inks: Hartmann Plates: BASF - Repro: Nypa-Flexo, Hungary.



Strong - yet recycled!

The latest in strong liners from Rieger: Bright white coated and uncoated testliners specially developed for **fruit- and vegetable trays** and containers for **chilled products**.

RiegerTop & RiegerTop DC

Strong. Special Sizing. Moisture Resistance. Bright white. Excellent printability.

■ www.rieger-papier.com



Rieger

Hamburger Containerboard Division

Phone: +49 (0) 86 21 / 8 04-0
e-mail: officerieger@rieger-papier.com

National Associations update

Spain's "sustainable social model" for climate change

A recent climate change report from the Spanish government proposes concrete and urgent measures to help reduce gases that cause the "greenhouse effect". It encourages "changes in the social model, production and energy consumption as well as much healthier development which respects our planet," said Deputy Prime Minister María Teresa Fernández de la Vega.

The paper and board industry has worked for years on manufacturing processes and products which respect the environment throughout their entire use cycles says AFCE. The sector enjoys an initial advantage: paper is a renewable raw material, recyclable and biodegradable. Each year wood for the paper industry absorbs some 7.5 million tonnes of CO₂, or 2% of Spain's total greenhouse gases.

Paper does not destroy trees: it creates them. It is impossible to make paper from trees that grow in the Amazon jungle or the "noble woods" oak and beech. The virgin fibre for paper must have characteristics only found in species of quick-growing trees like the eucalyptus and pine. These trees are harvested from plantations that are managed in a sustainable way for the paper industry. Due to this, the forest area in Spain has increased by 400,000 hectares, or slightly more than 2% of the total forest area, according to UNECE/FAO figures. These young plantations are believed to be effective allies in the fight against climate change being efficient absorbers of CO₂. A single hectare of forest annually absorbs around 20 tonnes of carbon dioxide.

To guarantee this process, Spain boasts 470,000 hectares with forestry certification

and nearly 150 businesses have certified their production process along the chain of custody.

Waste from the manufacturing of paper can be used as biomass for generating "clean" energy. Design evolution and weight reduction without the loss of resistance allow improvements in logistics and space economies in lorries and warehouses. This leads to fewer lorries, fuel savings and reductions in environmental and noise pollution as well as a cut in emissions.

Through the efforts of Spanish citizens, paper and cardboard is the material with the highest recycling rate in Spain at 60% and 4,637,700 tonnes of paper and cardboard was collected and recycled in 2006. Some 85% of paper is made of recycled material, a saving in landfill space equal to 45 filled football stadiums.

In short, corrugated cardboard has a big role to play when it comes to preserving our most precious resource - our planet.

Recycling facts for UK consumers about corrugated

The Confederation of Paper Industries (CPI) in the UK has produced a Corrugated Recycling & Landfill Prevention fact sheet aimed at consumers. It explores the place of corrugated board in the waste hierarchy and examines the waste management options which exist at all five levels. There is also constructive advice on the best use of recovered corrugated board. The fact sheet reinforces the product's proven environmental credentials. It also supports a promotional campaign called Corrugated Recycles, which is helping raise the profile of corrugated packaging by a distinctive on-product logo and highlights key environmental messages and statistics. For example, corrugated board has a recycling rate of 84% in the UK so that every four months an area the size of Greater London is saved from landfill. CPI's array of 18 fact sheets are available from the CPI website www.paper.org.uk/info/factsheets/factsheets.htm

FEFCO
European Federation of
Corrugated Board Manufacturers

Avenue Louise 250
B - 1050 Brussels
Tel: +32 2 646 4070 Fax: +32 2 646 6460
Email: info@fefco.org
www.fefco.org

Calendar of events

FEFCO Events

- ▶ **FEFCO Congress**
18-20 June 2008
Intercontinental Hotel
Prague, Czech Republic
www.fefco.org

Industry Events

- ▶ **European Paper Week**
27-29 November 2007
Sheraton Hotel and Towers Rogier
Brussels, Belgium
www.cepi.org
- ▶ **Interpack**
24-30 April 2008
Düsseldorf Trade Fair Center
Düsseldorf, Germany
www.interpack.com
- ▶ **Sino-Corrugated**
31 March-3 April 2009
Shanghai New International Expo Centre
Shanghai, China
www.sino-corrugated.com

Other Events

- ▶ **Europack Eurmanut**
13-16 November 2007
Lyon, France
www.europackonline.com
- ▶ **Pharmapack 08**
6-7 February 2008
Paris, France
www.pharmapack.com.fr
- ▶ **Fruit Logistica**
7-9 February 2008
Messe Berlin GmbH
www.fruitlogistica.de