

# ECMA Annual Congress 2011



HOTEL REY JUAN CARLOS I

## Shifting Business Patterns



EUROPEAN  
CARTON MAKERS  
ASSOCIATION

14-17 SEPTEMBER BARCELONA, SPAIN

# Shifting Business Patterns



## Introduction

At the occasion of ECMA's congress in Vienna last year, the celebration of our 50th anniversary was put in the context of the longer term perspective for the association and its members. This year's carton executives summit again addresses some fundamental challenges that are believed to have a longer lasting impact on our sector. The global economy may have survived the financial crisis of 2008-2009, but adjustment processes are still in progress as witnessed by the persistent imbalances between supply and demand that have resulted in unusual inflationary pressures in raw materials markets. Concerns have risen about the risks associated with excessive government debt financing inside the eurozone. The different recovery patterns across continents have made us aware of the shifting global balance of economic power and the associated trade patterns. Not only at macro level, also at supply chain level the crisis has accelerated fundamental shifts that are impacting the way we do business.

This year's ECMA Congress takes stock of current and future business drivers in areas like sustainability, product safety, marketing, innovation and leadership, presented by leading keynotes and experts in their field. One year after the launch of the ECMA Roadmap 2015, participants will be updated about progress made on the strategic priorities of our association. As a special feature of this year's programme, ECMA will proudly launch its **Guide to Good Manufacturing Practice for cartonboard food packaging**. At the Business Information Market on Thursday morning, participants will again have the opportunity to choose between a series of presentations hosted by leading suppliers on the latest market innovations in printing, pre- and postpress as well as materials technology.

After last year's success, this year's edition will again incorporate an interactive workshop session, this time on value creation. And of course, there would be no networking without an attractive concurrent social programme. This brochure contains full details about the programme, registration and accommodation.

### IMPORTANT NOTICE

**The conference language will be English.**

To encourage the pan European converter groups to register delegates from various facilities, ECMA offers a 25 % refund to converter companies as of the 3rd delegate for the group (and their partner). Please contact the ECMA secretariat for more details.



# Working Programme



## Wednesday 14 September 2011

### Internal ECMA Meetings

- 08.00 – 10.00 hrs **Pro Carton Steering Group**
- 10.00 – 12.30 hrs **Executive Committee / Strategy Committee**
- 12.30 – 13.30 hrs **LUNCH**
- 13.30 – 14.30 hrs **ECMA Delegates Assembly**
- 14.30 – 17.30 hrs **Company visits (optional, for converters only)**  
**OPTION I:** visit of HP Indigo Training Centre Barcelona  
**OPTION II:** visit of StoraEnso Packaging Boards, Barcelona Mill  
*Note: visits will take place simultaneously, only one option possible.*
- 15.00 – 17.00 hrs **Pro Carton General Assembly**
- 17.30 – 19.00 hrs **SME Forum  
Tobacco Forum**
- 19.00 – 23.00 hrs **Tabletop exhibition, cocktails and buffet dinner**

## Thursday 15 September 2011

### Morning: Plenary opening and Business Information Market

- 09.00 hrs **Opening of the Congress**  
**Per Lundeen**, President of ECMA (SE)  
*Introduction of Hans van Grieken, Capgemini (NL), as Congress Moderator. He is part of Capgemini's international innovation network and covers more than 25 different sectors in which innovation plays a key role. Van Grieken is a visiting lecturer at Delft University of Technology and has recently joined Nyenrode Business University as a Senior Lecturer on Global Innovation Sourcing. He is a regular speaker at international congresses focusing on these subjects, including last year's ECMA Congress.*
- 09.15 hrs **KEYNOTE SESSION**  
**Managing global shifts in business patterns through effective leadership**  
**Isabel Aguilera**, former President of GE in Spain and former CEO of Google, Spain and Portugal (E), is recognised as one of the most influential (female) business executives by internationally renowned business media such as Fortune, the Wall Street Journal and the Financial Times. Her 20 years of experience in marketing and operations serve Isabel well in her role as keynote speaker on topics like new technologies in business, effective leadership, innovation, management, HR and globalisation.

- 10.00 hrs **Spain and the global economy – where do we come from and where are we going?**  
**Fernando Valderrábano**, Vice President Global New Business Development, De Lage Landen International, Rabobank Group (E), will highlight the situation in Spain in the context of the global economic development and the impact of public debt restructuring in the "PIGS" countries for business prospects.

- 10.30 hrs **SESSION I:  
BUSINESS INFORMATION MARKET**  
Delegates are advised to check the ECMA website for further details about the contents of the individual hosted sessions and will be required to indicate in advance the sessions they wish to attend.

*Hans van Grieken* will interview the hosts of the parallel sessions in rounds 1, 2 and 3 about the topics of their sessions and will explain the organisational procedures to the Delegates

- 10.50 hrs **Organisational break**

#### 11.00 hrs **Parallel meetings round 1**

- Track 1: **Printing technology**  
Track 2: **Pre- and Postpress**  
Track 3: **Materials and Product Safety**

- 11.30 hrs **Break**

#### 11.40 hrs **Parallel meetings round 2**

- Track 1: **Printing technology**  
Track 2: **Pre- and Postpress**  
Track 3: **Materials and Consumables**

- 12.10 hrs **Break**

#### 12.20 hrs **Parallel meetings round 3**

- Track 1: **Printing technology**  
Track 2: **Pre- and Postpress**  
Track 3: **Materials and Consumables**

*The session presentations will be announced shortly on the ECMA website.*

- 13.00 hrs **TABLETOP EXHIBITION AND NETWORKING LUNCH**

# Working Programme

## Thursday 15 September 2011

### Afternoon: Plenary Working Programme

- 14.30 hrs **Introduction by the moderator**
- SESSION II:  
THE BROADER PICTURE FOR THE  
FOLDING CARTON INDUSTRY**
- 14.35 hrs **Consumer buying patterns and developments**  
*Jean Jacques Vandenheede (B)*, is the Senior Retail Industry Analyst for ACNielsen Europe. In this role he uses the comprehensive resources of the Nielsen Company globally, with a special focus on Europe to map the changes that affect the grocery retailing industry. He analyses format realities and the change drivers. He looks in a prospective way towards developing markets. Special attention is given to new developments within formats and channels. Research fields covered by Mr. Vandenheede further include Private Label and discount retailing in terms of shopper response and shopper expectations.
- 15.15 hrs **Global Trends in Board Supply**  
*Mats Nordlander*, is Executive Vice President Packaging, with regional responsibility for Asia Pacific and Country Manager for Sweden at StoraEnso (SE). In that role, he is well positioned to address the shifting global business patterns in cartonboard supply and demand and the resulting prospects for the packaging supply chain.
- 15.45 hrs **Global M&A Trends in Packaging**  
*Tom Blaige*, Chairman and CEO of Blaige & Company (US) highlights the continuing consolidation trend impacting the packaging arena and the role of private equity and debt capital markets in the rapidly expanding packaging M&A market. Proactive 'institutionalisation' of corporate practices is essential for packaging industry participants of all sizes to thrive in today's competitive marketplace.
- 16.15 hrs **Global Manufacturing Outlook: Relationships, Risk and Reach**  
*NN from KPMG International (D)* will present the results of a report that investigates how industrial manufacturers are adapting their business models and supply chain tactics to address the ever-changing global economic context. This report was produced in co-operation with The Economist Intelligence Unit
- 17.00 hrs **Closure Day 1**

## Friday 16 September 2011

### Morning: Plenary Working Programme

- 09.00 hrs **SESSION III:  
MANAGING THE FUTURE OF THE CARTON  
SECTOR**  
*(co-sponsored by Pro Carton)*
- 09.05 hrs **OPENING KEYNOTE  
Innovation and entrepreneurial mindset in corporations**  
*Sahar Hashemi* is one of the UK's most inspirational female entrepreneurs and a powerful speaker on innovation and entrepreneurial mindset in corporations sharing with the audience her captivating personal stories of building two famous brands; Coffee Republic, UK's first coffee bar chain, which she and her brother grew to 110 stores and £30m turnover and exited in 2001, and Skinny Candy, the guilt free confectionery brand which she sold to Glisten Plc in 2007.
- 10.00 hrs **Towards a common sustainability language for packaging**  
*Rudy Hagedorn*, Senior Business Consultant at the Consumer Goods Forum (F) will discuss the strategic and organisational implications for the supply chain of the Global Packaging Project set up by the world's leading retailers and brand-owners in collaboration with the packaging supply chain.



# Working Programme



10.30 hrs

## **Best practices in handling of food safety requirements for the packaging sector**

**Dr Ralph Derra** is Managing Director of Isega (D), the independent compliance testing institute specialized in pulp, paper and board, plastics, packaging and consumer goods, as well as colours, lacquers, additives and other chemicals. As one of the leading experts in this area, he will present an overview of the legislative, compliance and testing aspects to be taken into account when handling food safety issues.

Followed by:

## **Presentation ECMA Good Manufacturing Practice for cartonboard based food packaging**

**Arend-Jan Lutén**, Regional Director Continental Europe, Contego Packaging Group (NL) and Chairman of the ECMA Technical Committee, will present ECMA's latest management tool for the prevention of migration, organoleptic changes and contamination related to cartonboard based food packaging. This ground breaking tool is the result of a collaborative project between ECMA and its national member associations.

11.15 hrs

## **TABLETOP EXHIBITION AND COFFEE BREAK**

11.45 hrs

## **INDUSTRY ROUNDTABLE ON FOOD SAFETY**

**Hans van Grieken** will interview a panel of experts and business leaders from the folding carton community about the impact of food safety issues (legislative as well as market driven) on the positioning of the industry, their impact on the supply chain, the perception of food customers, the steps to be taken to meet their requirements as well as the tools, services and support to be expected from the trade associations concerned.

## **AWARDS CEREMONY Pro Carton/ECMA Carton Awards 2011**

## **Friday 16 September 2011**

Afternoon: Plenary Working Programme

13.00 hrs

## **TABLETOP EXHIBITION AND NETWORKING LUNCH**

14.30 hrs

## **SESSION IV: GATHERING DATA ABOUT THE FOLDING CARTON SECTOR** **Folding carton demand trends across the Atlantic in 2010/2011**

**Jules Lejeune**, Secretary-General of ECMA (NL) and **Ben Markens**, President of the North American Paperboard Packaging Council (US) will round up this session with a summary of the key statistics for the sector in 2010 and the outlook for 2011

15.00 hrs

## **Key Performance Indicators – a comparative analysis of the European folding carton sector**

**Rainer Greive**, Senior Management Consultant GC Graphic Consult (D) has been analysing the Key Performance Indicators of the ECMA SME Panel of independent small and medium sized enterprises in the European folding carton industry since 2006. Having built a track record with the panel, Rainer will benchmark the overall performance of carton business

15.30 hrs

## **SESSION V: CLOSING WORKSHOP VALUE CREATION – HOW NOT TO COMPETE ON PRICE?**

Interactive Session hosted by **Phil Allen**, President and Value Creator, GEMS Europe (CH) There is no such thing as a commodity. In the marketing mix, 'Price' is the only P that captures value. This session aims to inspire how in a B2B environment companies may succeed in creating and capturing additional value.

17.00 hrs

Closure of the congress, by **Andreas Blaschke**, incoming President ECMA (A)



# Social Programme

## Wednesday 14 September

- 12.00 – 19.00 hrs **Arrival participants and registration at ECMA desk**
- 19.00 hrs **Welcome cocktail and visit of the TableTop Exhibition at the Hotel Rey Juan Carlos I**
- 20.00 hrs **Welcome dinner round the pool of the Hotel Rey Juan Carlos I**  
(Dress code: business)

## Thursday 15 September

- 08.00 – 09.00 hrs **Registration at ECMA desk**
- Partners programme:**
- 09.00 hrs **Departure from the Hotel Rey Juan Carlos I for a Gaudi Tour**  
This tour will take you to the best of Gaudi; you will start with a visit of Parc Güell followed by a visit of the Sagrada Família. After that a stop at Casa Milà (La Pedrera) and Casa Batlló is on the programme for an exterior visit. Before lunch there will be a short walking tour with shopping possibility along the Paseo de Gracia.
- Lunch at Restaurant Mirador inside the Palau de la Musica**
- After lunch: visit of the Palau de la Musica (optional – shopping is also possible)**  
Designed in the Catalan modernista style by the architect Lluís Domènech i Montaner the Concert Hall - one of the most unique ones in the world - has been the privileged stage for the national and international concert life of the city of Barcelona for one hundred years.
- 15.00 hrs **Bus returns to hotel** (only for visitors to Palau de la Musica)
- 20.00 hrs **Departure from Hotel Rey Juan Carlos I to Opium Mar**
- 20.30 hrs **Informal dinner on the terrace of Restaurant Opium Mar at the seafront near Port Olímpic**  
(Dress code: casual)

## Friday 16 September

- 09.00 hrs **Departure from the Hotel Rey Juan Carlos for a short walking tour of the Barrio Gótico.** A visit will be made to the market La Boqueria on Las Ramblas to shop for ingredients to make Paella after which you will learn to make this typical Spanish dish at Restaurant La Fitora at Port Olímpic.
- Lunch at Restaurant La Fitora at Port Olímpic**
- Free time after lunch or back to the hotel**
- 15.00 hrs **Bus returns to hotel**
- 20.00 hrs **Departure from Hotel Rey Juan Carlos to Miramar**
- 20.30 hrs **Farewell dinner at Restaurant Miramar on Montjuïc**  
Dress code: smart casual

## Saturday 17 September (optional)

- 10.00 hrs **Departure from Hotel Rey Juan Carlos I for optional tour**  
The tour will start with a visit of Camp Nou, home of FC Barcelona, which will include a tailor made programme for the ECMA Delegates.
- After Camp Nou you will visit the Miró Museum. The building designed by Josep Lluís Sert offers you a stunning view of the city and a particular moment to see again or discover the work of Miró who throughout his life took a particular interest in the diversity of materials, forms and colours.
- Lunch at Restaurant Attic on Las Ramblas**
- 15.00 hrs **Bus returns to hotel** (optional – you can stay in city centre if you want to)



# Conditions of participation

PLEASE NOTE THAT THE CONFERENCE LANGUAGE IS ENGLISH  
THERE WILL BE NO SIMULTANEOUS TRANSLATION

## 1. CONFERENCE PACKAGE

### Includes:

- Full participation in the working programme (for delegates) including lunch
- Conference proceedings (English), to be placed on the Members Only part of the ECMA website
- Participation in the evening programme Wednesday 14, Thursday 15 and Friday 16 September
- Full participation in the social programme (for partners)

### Excludes:

- Optional tour on Saturday 17 September
- Hotel costs
- Travel costs

### FEES (per person)

Carton maker delegates / ECMA members	€ 1.095,00
Supplier delegates /	
Associated members of ECMA	€ 1.395,00
Partners	€ 490,00

### Optional programme

Camp Nou + Miró Museum (including lunch)	€ 150,00
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### Cancellation policy

- Full refund of the participation will be granted if the cancellation is received in writing before 17 August 2011.
- Full refund less a handling fee of EURO 150 per registrant will be granted to requests received in writing before or on 1 September 2011.
- No refunds will be granted for requests received after 1 September 2011.
- Cancellations only in writing, telephone cancellations will not be accepted.

*Please note that the details mentioned in this programme (timings and venues) may be subject to change.*

### FORCE MAJEURE

ECMA cannot be held legally responsible for any modification to the congress, additional costs or even cancellation of the congress, if such is the result of an event, occurrence, effect or any cause outside the control of ECMA (force majeure), including but not limited to fire, casualty, accident, riot or war, act of God, civil disturbance, act of public enemy, strike, lock-out, labour conditions or other labour controversy, failure or inability to obtain any necessary permit or license, failure or delay or reduction in transportation facilities or water, electricity or other public utilities, judicial order, law or enactment, order or act of any governmental instrumentality or military authority. ECMA accepts no responsibility for possible injuries sustained during any part of the event.

### HOTEL ROOMS

For this period, ECMA has ensured hotel rooms at the Hotel Rey Juan Carlos I.

The room rates for the Hotel Rey Juan Carlos I are:

- € 165,00 Standard Single room
- € 180,00 Standard Double room

The rates are per room, per night and are inclusive of breakfast and local taxes.



EUROPEAN  
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ASSOCIATION

## HOW TO REGISTER

### I. FOR THE CONGRESS

To register for the ECMA Annual congress 2011, please complete the REGISTRATION FORM and return it to the ECMA Secretariat in The Hague BEFORE 15 July 2011.

Fax: +31 (70) 363 63 48

E-mail: mail@ecma.org

### II. HOTEL ROOM RESERVATION

Your room reservation has to be made directly with the Hotel Rey Juan Carlos I.

For this purpose, please complete the ACCOMMODATION FORM, and return it to:

Hotel Rey Juan Carlos I

Fax: +34 93 364 42 32

E-mail: reservas@hrjuancarlos.com

**ECMA cannot guarantee room availability after 15 July 2011.  
Please make sure that your room reservation form  
is submitted to the Hotel Rey Juan Carlos I in time!**



# About the venues

## Parc Guell

It's a big garden located on the top of Barcelona, and therefore, it offers beautiful views to the entire city and to the sea in the background. The park was constructed for the businessman Eusebi Guell, between 1900 and 1914 and it was opened to the general public in 1922. The Park is a reflection of Gaudí's artistic fullness and it corresponds to his naturalistic period, during which he improves his personal style.



## La Sagrada Família

The expiatory church of la Sagrada Família is a huge piece of work which was started on March 19th, 1882. Gaudí started to work on the project in 1883 and he never left its side until his death in 1926. Since then, several architects have been working on it, always respecting Gaudí's original ideas and plans for this amazing project. Because of its peculiarity and forms, the Sagrada Família is a real architectural challenge. Its construction should be finished in about 30 years.

## Casa Batlló

Casa Batlló is a building restored by Antoni Gaudí and Josep Maria Jujol, built in the year 1877 and remodelled in the years 1904–1906 in the Eixample district of Barcelona, Spain. The local name for the building is Casa dels ossos (House of Bones), and indeed it does have a visceral, skeletal organic quality. It was originally designed for a middle-class family and situated in a prosperous district of Barcelona.

The building looks very remarkable — like everything Gaudí designed, only identifiable as Modernisme or Art Nouveau in the broadest sense. The ground floor, in particular, is rather astonishing with tracery, irregular oval windows and flowing sculpted stone work.

## Casa Milà (La Pedrera)

Casa Milà better known as La Pedrera (meaning the 'The Quarry'), is a building designed by the Catalan architect Antoni Gaudí and built during the years 1905–1910, being considered officially completed in 1912. It is located in the Eixample district of Barcelona, Catalonia, Spain. Casa Milà was in poor condition in the early 1980s. It had been painted a dreary brown and many of its interior colour schemes had been abandoned or allowed to deteriorate, but it has since been restored and many of the original colours revived.

## Paseo de Gràcia

Paseo de Gràcia is both one of the major avenues in Barcelona and also one of its most important shopping and business areas, containing several of the city's most celebrated pieces of architecture. It is located in the central part of Eixample, stretching from Plaça Catalunya to Carrer Gran de Gràcia. In terms of the cost of renting or buying property anywhere in this avenue, Paseo de Gràcia is nowadays regarded as the most expensive street in Barcelona and also in Spain, ahead even of Calle Serrano in Madrid.

## Palau de la Musica

One of the most representative monument of the barrio Gótico is the Catalanian Music Palace. An exuberant construction made by steel, full of light and space, decorated by several great artists from the epoque. Inaugurated in 1908, it's a very modernist and characteristic monument.

In 1997, the palace has been classified World Heritage Site by the UNESCO.

## Restaurant El Mirador

Palau de la Musica, a significant building in the old town of Barcelona, with an absolute beautiful facade and spectacular interior. The last restorations were made by the Architect Tusquets, a glass construction that stands in contrast with the original modernist facade. El Mirador del Palau de la Musica is also new since these last changes.

## Barrio Gótico

The Barrio Gótico can be easily recognized as the oldest and most historic part of the city, with its medieval buildings and labyrinthine narrow roads. From the 4th Century until the middle of the 19th century it was entirely enclosed by strong Roman walls and fortifications. Fragments of these walls can still be seen.

The most relevant monument of this quarter is the Cathedral, a splendid example of Gothic architecture at its finest, that was begun in 1298 and completed in 1448. This was the period of Barcelona's medieval golden age. As the Mediterranean city's trade and economy flourished, its architects laid down the foundations of many of what are still today the city's most important buildings. The majestic Santa Maria Del Mar, with its imposing huge arches that sweep above the altar, the church of Santa Maria del Pi and the Saló de Tinell in Plaça del Rei are some of the most significant legacies of the European Gothic movement.

## La Bocquería

The Mercat de Sant Josep de la Boqueria, often simply referred to as La Boqueria, is a large public market in the Ciutat Vella district of Barcelona and one of the city's foremost tourist landmarks, with an entrance from La Rambla, not far from the Liceu, Barcelona's opera house. The market has a very diverse selection of goods.

## Camp Nou

Camp Nou ("New Field") is a football stadium in Barcelona. The stadium, located in the west of the city, has been the home of FC Barcelona since its construction in 1957. It has hosted numerous international matches at a senior level including two UEFA Champions League finals, the most recent being in 1999. It seats 99,354, making it the largest stadium in Europe and the eleventh largest in the world in terms of capacity. Its official name was Estadi del FC Barcelona (FC Barcelona Stadium) until 2000, when the club members voted to formally adopt the popular nickname Camp Nou. It held UEFA five-star status until 2006, when a new rating system was introduced by UEFA.

## Miró Museum

The Joan Miró Foundation opened to the public on 10 June 1975. It had its origins in Miró's first large exhibition in Barcelona, in 1968, at the Antic Hospital de la Santa Creu. Several figures from the world of the arts saw the opportunity to have a space in Barcelona dedicated to the artist's work. However, in accordance with his wishes, the new institution was also to promote and publicise the work of contemporary artists in all its aspects.

At a time when artistic and cultural life was certainly minimal, the Foundation brought a refreshing vitality, together with a new, more dynamic concept of an art museum in which Miró's art was shown alongside a wide variety of creative works by other artists - a fact that is reflected in the Foundation's full name of Centre for the Study of Contemporary Art.