

Conference report

LINING UP FOR THE FUTURE: **AWA hosts the release liner industry's big event**

'The release liner industry IS innovating', said Corey Reardon, President and CEO of AWA Alexander Watson Associates, opening the annual AWA Global Release Liner Conference & Exhibition in Denver, Colorado, last month. Over 150 delegates, representing the industry's supply chain, met to participate in a program that consisted of three core elements: the full conference agenda; a silicone and technical session; and a release liner workshop.

Global industry profile

AWA Alexander Watson Associates has annually hosted this lead event in the industry's calendar for the last 15 years, and brings in-depth knowledge of the subject to the agenda. The conference complements the company's extensive portfolio of market research reports and private client projects on all aspects of the release liner market. Corey Reardon set the overall agenda with his annual market summary and an evaluation of the changing market structure, featuring new owners and also new entrants, new technologies, and a new focus on meeting customers' needs. Forecasting industry growth to 2019 at an average 4.8% across all regions, he also provided delegates with regional forecasts, end-use market trends, and changing choices in release liner substrates.

Live 'real time' survey

AWA VP and Senior Consultant Jackie Marolda shared the results of AWA's annual Industry Survey; and in a unique 'live' survey, Corey Reardon conducted with the audience using electronic counters to record and display the answers, shared the 'real time' responses to questions centered on the strategic planning horizons, strategic focus, strategy implementation, approach to innovation and companies' different focuses and challenges. The survey ended with questions about the

liveliness of the industry and the stage in its lifecycle which it has reached – introduction, growth, maturity, or decline. Mirroring the AWA Industry Survey, respondents at the conference considered the industry to be in its mature phase.

Industry leaders debate issues and opportunities

Appropriately, the event brought together four influential industry CEOs and leaders to discuss and evaluate key management topics for the industry. Moderated by Corey Reardon, the Executive Leadership Panel featured Dr Bernhard Klofat, CEO of Felix Schoeller Group; Anthony P. MacLaurin, CEO, FiberMark Inc; Tomas Rink, President of Ritrama and David Silverstein, founder and CEO of BMGI. The resulting discussion was both lively and informative, and demonstrated exactly how diverse are the approaches to leadership and management in an industry which is seeking to innovate in every way. Delegates commented on session as a real contribution of ‘food for thought’.

Innovate – the conference keynote

US-based BMGI – an internationally-recognized operational strategy consultancy -- also contributed insights into the way to create pathways to innovation with two very focused presentations. In the conference keynote, David Silverstein himself elaborated on the theme of ‘collecting the dots’ for which he is famous. Collecting the dots, the theory says, must be the precursor to joining them up – and achieving success. Mr Silverstein’s colleague, BMGI’s Chief Innovation Officer, Dr Phil Samuel, went on to present case histories which demonstrated different, and highly-effective approaches to innovation. His premise was that ‘Innovation is for everybody’, and anyone can unlock his or her potential using a toolset of seven key ‘habits’.

The subject of innovation ran through the day’s conference program, with Dr Wilhelm Munninger, Technical Director for Mondi, exploring it from a release liner industry supplier’s perspective, and highlighting two areas where real advances are being seen – in linerless labels, and in surface structuring of the liner substrate. Loparex’s VP, Global Sales and Marketing, Michael Werner, posed the question ‘Are we our own worst enemy?’ – He went on to point out that ‘cost-out by itself is not necessarily

innovation', and that innovation is not just about the product: customer needs should ignite the process.

One of the day's closing papers was a summary of the program's innovation content from AWA's Jackie Marolda, who drew together all the various threads into one overarching question: 'How can we take innovation learning and theory and grow the opportunities for our companies and our industry?'

The business aspects

The first day of the conference also featured important updates on the financial and business aspects of the release liner industry. William Hornell, MD of Mesirow Financial, looked at the current status of M&A activity – which is currently at a high level. 'We're back in the boom period!' he said. Ian Murdoch, PwC's European Leader in Forestry, Paper, and Packaging Practice, provided an in-depth analysis of the performance and ROI of the industry's top 100 players, ranking them by turnover both overall and by region, in his respected annual global survey.

End-use applications

The conference's second day was focused very firmly on the broader horizons of end-use applications. Paul Roba, a leading self-adhesive graphics industry instructor, installers, and consultant, opened proceedings with a declaration that release liners are the unsung heroes of self-adhesive graphics – and explained why. Next, Greg Rucks, Principal, Transportation & Industry at the Rocky Mountain Institute, introduced the Institute's technical autocomposites project, which – working with leading companies in key supplier areas -- is kick-starting the mainstream adoption by the automotive industry of carbon fiber composites. A hands-on presentation about the use of pre-preg in building a graphite composite snowboard – was given by specialist Steffen Hak, who ably demonstrated the key role of the release liner in achieving a successful outcome.

The label market

Of course, the release liner's largest market, pressure-sensitive labels, was not neglected, and Dan Muenzer, VP, Marketing for Constantia Flexibles, presented a

colourful and exceptionally-full catalogue of current trends and developments in pressure-sensitive labeling and its competition.

Closing the formal conference program, AD Tape and Label's Mike O'Connell – Business Development Manager concerned with designing and creating disposable medical devices and printed labels, detailed the particular performance requirements for release liner in the fast-growing medical sector.

Silicone and technical session

The event's agenda featured additional concurrent programs, including the Silicone and Technical Session, which provided an opportunity for technical delegates to hear about the latest trends in manufacturing; release coatings and their technology (including non-silicone release coatings); adhesives; the adhesive/release liner interface; radiation curing vs platinum-catalysis; cellulose nanofibrils and other developments in paper release base; creating an 'unbreakable' film liner; layflat; humidity control in label laminates; and anti-ageing. Chaired by Dr Sjaak Elmendorp, Vice President, Core Technology, for Avery Dennison's Materials Group, the event presented industry technology advances for the very first time. It was extremely well attended, and created plenty of discussion during the subsequent cocktail party around the tabletop exhibition.

Release liner workshop

The Release Liner Workshop, running concurrently with the technical session, provided an opportunity for many new industry recruits to gain insights into the role of release coatings and liners in pressure-sensitive materials. Chemsultants International host regular events with AWA Alexander Watson Associates on the subject, and have created an in-depth program that briefs participants on all aspects of pressure-sensitive adhesive-coated products, from constituents to coating, converting, testing, and quality assurance.

Industry sponsors

The conference was sponsored by several leading companies in the industry – platinum sponsors Dow Corning Corporation, Infiana (formerly Huhtamaki Films), and UPM; gold sponsors BillerudKorsnäs, Bluestar Silicones, Felix Schoeller

Release, Loparex LLC, Mondi, Starkraft, Verso Paper Corp., and Wacker; and silver sponsors Akronn, Boise Paper, Chemsultants International, Evonik Corporation, and Expera Specialty Solutions.

‘Content that challenged thinking and was inspirational...’

Together, the three elements of the program made what FiberMark’s Anthony MacLaurin described as ‘a truly international experience with content that challenged thinking and was inspirational for innovation.’ Delegate Calvin Frost, Chairman, Channeled Resources Group, added: ‘This gathering is a must if you are in the releases liner business. It is an important annual event that shouldn’t be missed!’ Christian Velasquez, Americas Marketing Director, Dow Corning Corporation, agreed: ‘A great venue to meet the group of silicone users that hold the largest share of the release liner market.’

The annual AWA Global Release Liner Conference & Exhibition alternates between North America and Europe, and will take place next year in Vienna, Austria, April 2016. www.awa-bv.com

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