



FIPAGO ANNUAL NEWSLETTER

1. Introduction President

Dear Members,

Although a couple of weeks passed away in the New Year I want to send my best wishes for you and your families for 2009. Relating to business we are having a hard time which will demand lots of efforts of us. I wish you and your staff all needful success for that entrepreneurial accomplishment.

Even if there is in the areas of FIPAGO-Members the one or another country where the production will have more profit as standard, I think we speak of more or less same problems in a globalized world.

The last year has been quantitatively sufficient for most of us. Nevertheless we had to accept a reduction of efficiency because of enormous prices of raw material. Price increases have been in all for us important areas, from paper to freights and lots more. Could we raise our prices?

Enjoyable is the increased number of participants at our congress in Prague last June, and here I think I can speak for all participants too, it was an extremely interesting and accompanied of lively discussions meeting of FIPAGO. These interests have been continued at our annual board meeting in December at Amsterdam. It shows that we are able to make things move together. And so I would like to invite you to the annual congress this year at June 18th/19th in Sicily to bring forward our collective wish, all issues about “gummed paper” And by the way, Taormina is always worth for a visit, not only because of the FIPAGO Congress. So I hope I will see again all members and guests as well as their partners/ marriage partners and remain with best wishes for all of you.

Hans Kaiser

President

February 2009

Ref.: 200900026



Newsletter FIPAGO 2009

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2 FIPAGO CONGRESSES

a. PRAGUE, CZECH REPUBLIC 2008

The 52nd. FIPAGO congress took place on June 5-6 2008 in Prague, Czech Republic. Fifteen delegates from 7 countries attended the meetings. The economic situation and developments on the gummed tape markets in the various countries were discussed. Special attention was paid to environmental matters like the carbon footprint for paper products. In the EU the regulation on chemical items (REACH) was considered as important for the period to come. After the meetings the guided tour in the city of Prague really was an experience!

b. WELCOME TO THE 2009 CONGRESS on June 18-19 in Taormina on the isle of Sicily, Italy

On June 18-19 June, the next Congress will be organized in Taormina, on the eastern end of the beautiful Isle of Sicily, Italy. Further details on the hotel accommodations will follow soon. You will get a personal invitation by e-mail. In due time you will also find information on www.fipago.org

The provisional programme looks as follows:

June 18

Approx. 12.00 hrs.:	Welcome drink and snack at the hotel
13.00 – 17.00 hrs.:	Meeting Board/General Assembly and Congress
	Alternative program spouses
20.00 hrs.	Dinner

June 19

09.00- 16.00hrs	Excursion to the Etna area with guide (German and English speaking) including lunch
20.00hrs.	Dinner

June 20	Departure
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3 WEBSITE

Hopefully you have visited our website www.fipago.org frequently already. As you know, a special part is open for members only. Therefore, you received your username and password. Using these, you have access to this protected area. At the moment you find reports and documents in relation to issues and meetings. You can also send in information from your



firm/country to share this with the colleagues. We will publish your information on the web. When you have any suggestions, please contact us.

4 STANDARDS

The German organisation DIN is updating the industrial standards for gummed paper tapes. Neubronner was asked to give support reviewing these standards. In the eighties of the last century FIPAGO created a standard for gummed paper which for the greater part was copied from the German standards. These standards still are very important for both, quality reasons and protecting our industry and customers against some imports from China. People are convinced we continue to need these standards for our industry. Copies of these standards are available (downloadable) on the FIPAGO website www.fipago.org.

There are two major standards:

- ***Plain sealing tapes from kraftpaper***

This standard covers the specification and use of "plain gummed tapes from kraftpaper, unbleached or bleached".

The purpose of this standard is:

- the assessment of minimum requirements for quality and delivery specifications of gummed tapes;
- standardization of application equipment;
- reduction of stockkeeping;
- optimum conditions

- ***Sealing tapes fibre reinforced from kraftpaper (double ply)***

This standard covers the specification and use of "laminated double ply paper tape reinforced with glass fibres".

The purpose of this standard is:

- the assessment of minimum requirements for quality and delivery specifications of gummed tapes;
- standardization of application equipment;
- reduction of stockkeeping;
- optimum conditions.

During the last Board meeting in November 2008 members were informed that The German Standards Institute DIN launched revised (draft versions on) standards. It concerns standards on both, gummed paper tape and plastic adhesive tapes. You can still find them on the member part of www.fipago.org (enclosure to report Board meeting November 24th).

These standards are:

- DIN 55475 concerning gummed paper tapes

Special attention: page 6 class 1: plain tapes; class 2: reinforced tapes. Page 7: material for the corrugated board industry



- DIN 55477 concerning plastic adhesive tapes

Comments on these can be sent to DIN until the end of March 2009. Launching of the official new standard is expected one year later. DIN standards, after minor adjustments have been made, use to become Fipago standards as well. At the moment in the Fipago standard widths of the tapes differ from DIN. If you have any questions, please let the Fipago secretariat know.

5. REACH

REACH stands for Registration, Evaluation and Authorization of Chemicals. During both, the last congress and the Board meeting its impact in the European Union area was discussed. The REACH Regulation gives greater responsibility to industry to manage the risks from chemicals and to provide safety information on the substances. Gummed paper as such is not a chemical substance. However, gummed tape producers have to ensure that the included substances for the used purposes have been registered by their suppliers. Special information can be found on http://ec.europa.eu/environment/chemicals/reach/reach_intro.htm

6 MEMBERS

On the Fipago website you will find the latest list of FIPAGO members. FIPAGO welcomed one new member: VENTAPEL, gum tape producer and converter, settled in Argentina.

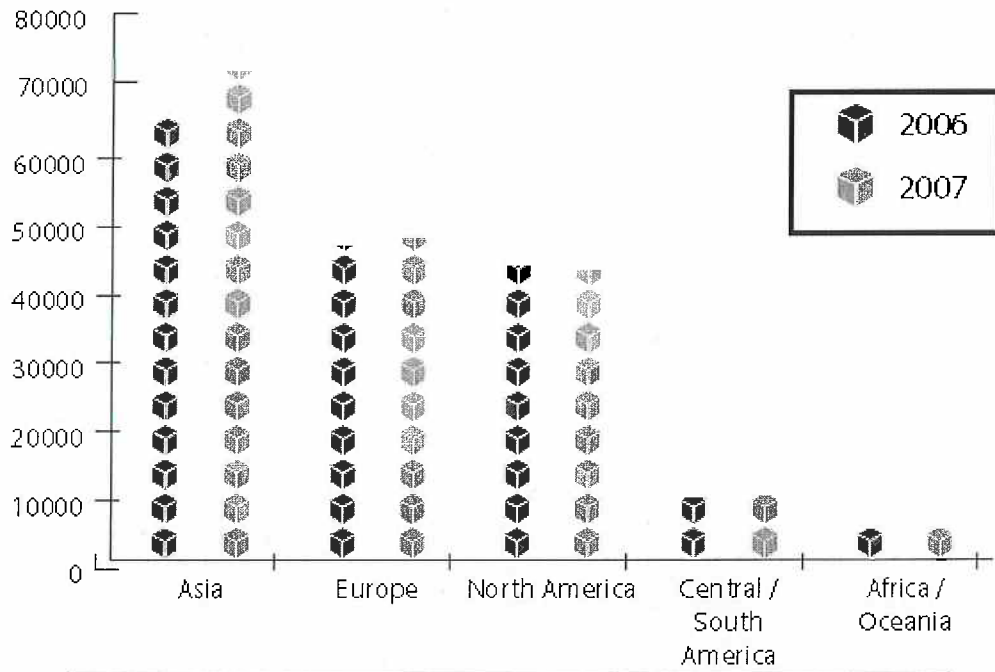


7. **FACTS ON THE CORRUGATED BOARD INDUSTRY**

**Year End 2007
CORRUGATED PRODUCTION/SHIPMENTS
(Million Square Meters)**

REGION / COUNTRY	1st Quarter		2nd Quarter		3rd Quarter		4th Quarter		LATEST QUARTER % CHANGE	YEAR TO DATE		% CHANGE
	2006	2007	2006	2007	2006	2007	2006	2007		2006	2007	
ASIA	15,587	17,046	16,465	17,543	16,399	16,040	16,708	16,469	10.5	65,259	71,498	9.8
EUROPE	11,473	11,872	11,475	11,851	11,300	11,615	11,685	11,667	0.3	45,825	47,003	2.4
NORTH AMERICA	10,704	10,454	10,926	10,757	10,984	10,824	10,542	10,437	-1.9	42,936	42,333	-1.3
CENTRAL S. AMERICA	2,118	2,217	2,170	2,306	2,221	2,300	2,273	2,350	3.4	8,783	9,176	4.5
OCEANIA	306	303	301	326	301	316	324	329	3.5	1,296	1,384	6.8
AFRICA	427	443	481	489	481	490	483	500	3.5	1,872	1,932	3.2
WORLD	40,960	42,656	42,108	43,955	41,656	43,743	42,375	44,082	4.0	167,099	174,476	4.4

**2007 CORRUGATED
PRODUCTION / SHIPMENTS
(Millions of Square Meters)**



Source: ICCA: www.iccanet.org



Classification of shipments by end-use sector as a % of volume, in various European countries

2007

Country	Food	Non-food
Spain	56	43
Great Britain	43	57
Netherlands	56	43
France	57	45
Germany	35	65
Italy	33	67
Turkey	38	63

Die-cut boxes as a % of total shipments in m²

	2000	2007
Germany	40	42
Spain	54	55
Great Britain	36	31
Italy	34	NA
The Netherlands	36	40
Turkey	20	31

Source: FEFCO annual reports

8 FEES

The 2009 fee levels:

Large members	€ 1790,00
Other members	€ 900,00
Associate members	€ 285,00

9 FIPAGO PUBLICATIONS 2008

FIPAGO Newsletter	February
Presentations Congress 2008	June
Test paper availability	

The web page www.FIPAGO.org is still visited well. FIPAGO Brochures, on the advantages of Gummed Paper Tape and equipment, are still available at the secretariat in the languages English, French, German, Italian and Spanish.

10 REVIEW FIPAGO CONGRESSES 1957-2008

See document on the member part of the Fipago website.