

AWA
**GLOBAL RELEASE LINER
CONFERENCE 2023**

20-22nd March 2023, Denver, Colorado

PROCEEDINGS

THANK YOU

It was our pleasure to welcome you to the AWA Global Release Liner 2023. Your participation was highly appreciated, and we hope the event benefited you and your organization.

Included are the proceedings of the event. We want to thank our supporters and speakers for their valuable contribution to the program.

We welcome any feedback for improvement as it contributes to further developing our conferences.

Thank you again for participating in the AWA Global Release Liner Conference 2023. We wish you all the best and look forward to welcoming you again at one of our future events!

With kind regards,

AWA Conferences & Events

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CONTENT

Conference Proceedings

Visual Notes from the Conference

AWA Global Release Liner Industry Survey 2023

Upcoming Events

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PROGRAM MARCH 20

08:30-09:00 **AWA Market Intelligence Round Table & Workshop**
Catalina Steenbakkers, Sr. Market Research Consultant, AWA Alexander Watson Associates

PROGRAM MARCH 21

PLENARY SESSION

08:00-08:30 **Conference Opening & Global Release Liner Market Overview**
Corey M Reardon, President & CEO, AWA Alexander Watson Associate

08:30-09:00 **AWA Release Liner Industry Real Time Survey**
Corey M Reardon, President & CEO, AWA Alexander Watson Associates

09:00-09:30 **Keynote: The Dilemma of Sustainable Growth**
Sean Duffy, VP Sustainability and Regulatory Compliance, ELKEM

09:30-10:00 **Economic Outlook and Investments**
Peter Corle, North America Commercial Director, DOW

10:00-11:00 **Coffe Break & Tabletop Exhibition**

11:30-12:30 **Executive Leadership Panel Discussion**
Communication, Coordination, Cooperation and Consolidation
Moderators:
Corey M Reardon, President & CEO, AWA Alexander Watson Associates
Jonathan White, Managing Director, Mazzone & Associates
Panelists:
Sean Duffy, VP Sustainability and Regulatory Compliance, ELKEM
Nick Lupoli, COO, FLEXcon
Charmaine Riggins, CEO, Loparex
Amit Kalra, President, Polyplex

PROGRAM MARCH 21

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	Voice of the Customer	Technology & Innovation
	<p>Moderator: <i>Cherri Janos, Business Solutions Manager, Mondi Group</i></p>	<p>Moderator: <i>Tim Janes, Association for Roll-To-Roll Converters (Formerly AIMCAL)</i></p>
13:30-14:00	<p>Why “Thinner” is the New “Better”. The Direction of North America PS Liner in 2023. <i>Kevin Clunie, Vice President Sales and Marketing NA, Mactac</i></p>	<p>Key Role of UV LED Curable Silicones for Sustainable Release Coatings <i>Agnès Jolly, PhD, Self Adhesive Industry Technical Service Global Leader, Elkem Silicones</i> <i>Kyle Rhodes, Self-Adhesive Industry Business Group Manager, Elkem Silicones</i></p>
14:00-14:30	<p>Tapes, Adhesives, Liner <i>Ann McGlone, Global Market Manager – PSA, Bostik</i></p>	<p>Release Liner and Die Cutting: Adjustable Dies <i>Nadine Powell, Global Product Manager, RotoMetrics</i></p>
14:30-15:30	Coffee Break	
15:30-16:00	<p>Building & Construction- Presentation Polyglass USA <i>Alejandro Formoso, Director of Procurement and Supply Chain, Polyglass USA, Inc.</i></p>	<p>A Contribution to Reduce the Carbon Footprint for Release Liners in Graphic Arts Applications <i>Gunnar Sieber, Head of Sales CCK, Sappi</i> <i>Jan Hasselblatt, Head of Sales Self-adhesives, Sappi</i></p>
16:00-16:30	<p>Procurement & Supply Chain Challenges & Opportunities <i>Aleasha Markley, Vice President of Supply Chain, FLEXcon</i></p>	<p>Drying Periods <i>Ted Lightfoot, Principal Consultant & Owner, Ted Lightfoot LLC</i></p>

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PROGRAM MARCH 21

	Voice of the Customer	Technology & Innovation
	<p>Moderator: <i>Cherri Janos, Business Solutions Manager, Mondi Group</i></p>	<p>Moderator: <i>Tim Janes, Association for Roll-To-Roll Converters (Formerly AIMCAL)</i></p>
16:30-17:00	<p>VOC Paper & Film Release Liner Recycling <i>Lara Pearson, Recycling and Circular Logistics Program Manager, Avery Dennison</i></p>	<p>Panel Discussion: The Future of Silicone & Coating Technology</p> <p>Moderator: <i>Tim Janes, Association for Roll-To-Roll Converters (Formerly AIMCAL)</i></p> <p>Panelists: <i>Dr. Ian Moore, VP BU CONSUMER and VP Silicones NCA, Wacker</i> <i>Francisco Palencia, Senior TS&D leader NA, Dow</i> <i>Kyle Rhodes, Self-Adhesive Industry Business Group Manager, Elkem Silicones</i> <i>Jacob Reid, Release Coatings Technical Manager, Evonik</i></p>
17:00-17:30	<p>VOC Beontag and Release Liner Market & Suppliers <i>Barbara Dunin, Director of ESG, Marketing and Communications, Beontag</i></p>	
17:30-19:00	<p>Cocktail Reception and Tabletop Exhibition</p>	

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PROGRAM MARCH 22

PLENARY SESSION	
07:30 – 08:30	Welcome Coffee & Networking Break, Tabletop Exhibition
08:30 – 09:00	State of the Paper Industry- Release Liner Paper Base Supply <i>Gregory Rudder, Managing Editor, PPI Pulp & Paper Week, Fastmarkets RISI</i>
09:00 – 09:30	Long Term Supply of Release Base Paper <i>Niko Kinnunen, Head of Sales Americas, UPM Specialty Papers</i>
09:30 – 10:30	Coffee Break & Tabletop Exhibition
10:30 – 11:00	CELAB Update: Release Liner Recycling <i>Kevin Clunie, VP North America, CELAB</i> <i>Kyle Rhodes, Self-Adhesive Industry Business Group Manager, Elkem Silicones</i>
11:00-11:30	Release Liner Sustainability & Recycling Presentation <i>Jeffrey Krueger, Application Engineer, Mondi Group</i>
11:30-12:00	PET Supply Chain & Reprocess Liner Solution <i>Jeff Morris, VP of Sales and Marketing, Mitsubishi Polyester Film</i>
	Panel Discussion: Sustainability Leadership and the Future
12:00-13:00	Moderator: <i>Wilco van Zwieten, CEO, Panoval</i> Panelists: <i>Matt Wilkinson, Sustainability and Circularity Technical Manager, Avery Dennison</i> <i>Catalina Steenbakkers, Sr. Market Research Consultant, AWA Alexander Watson Associates</i> <i>Tyler Matusevich, Sustainability Director, Brook + Whittle</i> <i>Ginnie Gandy, Account Manager, Channeled Resources Group</i>

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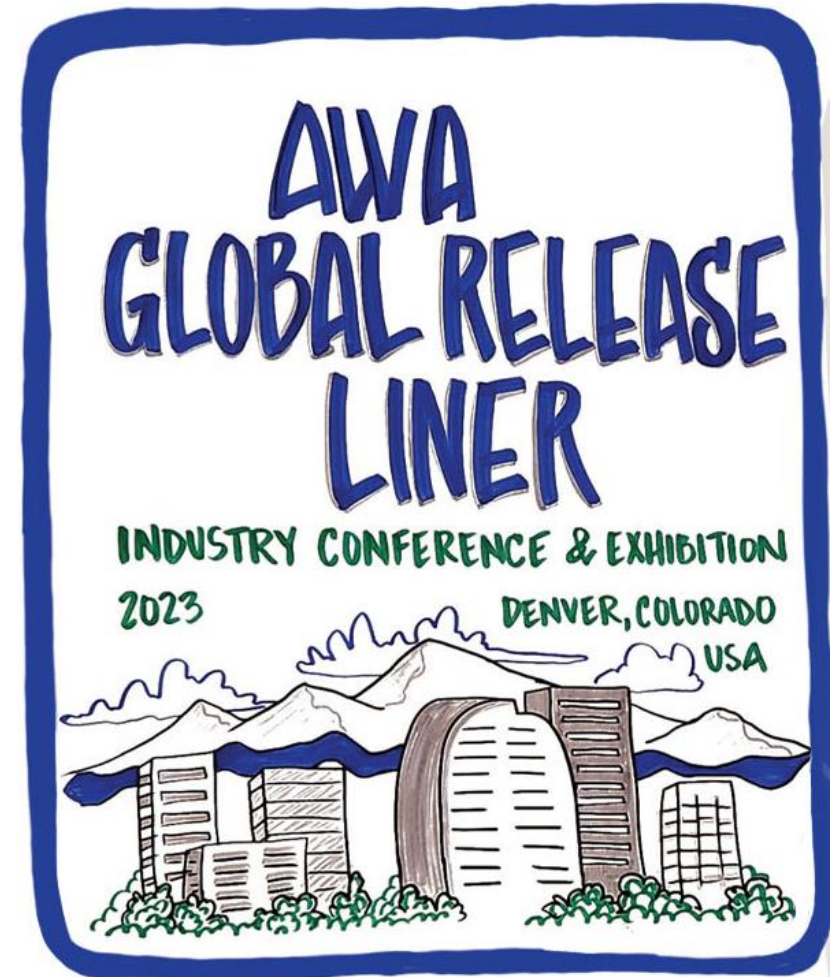
the visual help

Ellen O'Neill

Graphic Recorder and Facilitator, Founder@ Noted By Ellen

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AWA GLOBAL RELEASE LINER

INDUSTRY CONFERENCE & EXHIBITION
2023 DENVER, COLORADO USA

ANNUAL SURVEY

WHO IS IN THE ROOM?

MAJORITY

- BASED IN NORTH AMERICA
- MARKETING SALES
- EXPECT 2-4% GROWTH
- BELIEVE IN CLIMATE CHANGE
- FAVORITELY FOR DESIGN TRANSITION
- INDUSTRY IS CHANGING ALONG
- BELIEVE CLIMATE CHANGE WILL IMPACT BUSINESS IN 1-10 YEARS

HALF & HALF

- INVOLVED WITH CELAB RECYCLING

DILEMMA OF SUSTAINABLE GROWTH

IT'S NOT ONLY ABOUT CLIMATE

IT IS ABOUT RESOURCES

EARTH OVERSHOOT DAY ... WE NEED 1.75 EARTHS

THE ROAD TO... SUSTAINABILITY

WHAT CAN WE DO?

DON'T PANIC

WHERE ARE YOUR OPPORTUNITIES TO IMPACT?

- BEHAVIOR
- REPLACE CARBON
- CHANGE PROCESSES
- REGULATIONS
- CONSOLIDATION
- COLLABORATION
- CIRCULAR MARKET
- PRODUCT END-OF-LIFE

LEADERSHIP PANEL DISCUSSION

WHAT DISRUPTIONS ARE YOU STILL CONTENDING WITH?

EVENTS AROUND THE WORLD WILL LOWER LABOR COSTS

MATERIAL COSTS

INFLATION: UP LIKE A ROCKET

DOWN LIKE A FEATHER

CAUTION

IMPROVEMENT

DRIVEN BY INNOVATION

MORE ELECTRIC VEHICLES

HEALTHCARE GROWTH

5 YEARS

HOW DO YOU SEE THE BUSINESS OUTLOOK?

HAVING THE PARTNER IS KEY

ECONOMY OF SCALE

IT MAKES SENSE WHEN IT MAKES SENSE

WHAT ARE BENEFITS OF CONSOLIDATION?

WE MUST COLLABORATE

WHO IS DRIVING THE CHANGE?

SUSTAINABILITY IS NO LONGER A PEAK - IT IS A REQUIREMENT

WHAT ARE THE BIGGEST SUSTAINABILITY CHALLENGES?

STATE OF THE PAPER INDUSTRY

MARKETPLACE OF UNCERTAINTY

WHEN IS THE BUSINESS?

I DON'T KNOW!

PRICE FLUCTUATION IS AN ONGOING STORY

MULTIPLE LOGS

LOCATION CHALLENGES

THE SUPPLY

THE DEMAND

HOME DELIVERY

COMMODITY

E-COMMERCE CONTINUES TO BE STRONG

THE GOAL IS GLOBAL ACCESS TO RECYCLING

CELAB UPDATE

TASK 0

WASTE GENERATORS

RECYCLING NETWORKS

TASK 0

PARTNERSHIPS & COORDINATED OUTREACH

LOBBYING TO PROTECT INDUSTRY INTERESTS

MORE PROJECTS

EDUCATION - WHAT CAN BE RECYCLED?

RECOVERY? PET SUPPLY CHAIN

IT'S NOT A QUESTION OF IF... IT'S A QUESTION OF WHEN

WE DEFEND ON CUSTOMER FEEDBACK

INTEREST LEVELS DRIVE CHANGE

GRADE WILLINGNESS TO CHANGE

CREATE CIRCULARITY WITH THE SAME PERFORMANCE

CHANGE IN VIEW

GREAT LINER AS A RESOURCE RATHER THAN WASTE

THERE MUST BE STABILIZER - BUY-IN

Live Graphic Recording: Noted by Ellen

MARKET OVERVIEW

GROWTH RATES

SIGNIFICANT SLOWDOWN

DISRUPTIONS ARE PLENTY

COVID

INFLATION

SUPPLY CHAIN

LABOR

SUSTAINABILITY A CHALLENGE AND A PRIORITY

ECONOMIC OUTLOOK

DYNAMIC MACRO ENVIRONMENT

OPPORTUNITIES FOR GROWTH

NEW STRATEGIES

NEW MARKETS

NEW TECHNOLOGIES

WHY THIN IS THE NEW BETTER

WHY THIN?

THIN GOES FURTHER

MORE LABELS PER ROLL

FREIGHT SAVINGS

TAPES, ADHESIVES, LINERS

SUSTAINABLE SOLUTIONS

- BIO BASED ADHESIVES
- WASH OFF & EASILY REMOVED LABELS
- SOLVENT FREE TAPES
- LINERLESS LABELS
- SELF ADHESIVE LABELS

LONG TERM SUPPLY

EVERYTHING COMES BACK TO THE FOREST

PLANNING FOR THE FUTURE

IT'S ALL ABOUT THE LONG TERM

2023

WE KNOW THE CHALLENGES, BUT WE CAN DO IT

IF NOT NOW, WHEN?

BUILDING & CONSTRUCTION

HOW DO WE MAKE THIS EASIER?

RESIDENTIAL

COMMERCIAL

TEST PROCEDURES AND PRODUCTS FOR QUALITY

OVER COMMUNICATE

WHAT WE LEARNED

OVER THE LAST FIVE YEARS

PUT THE CUSTOMER FIRST

WE NEED CAMARADERIE IN THE INDUSTRY

LEADERSHIP

INNOVATION

SHIFT WHAT IS POSSIBLE

TRANSPARENCY

SHARING INFO

RESILIENCY

DATA IS KEY

PIVOT!

STRATEGIC PARTNERSHIPS

NETWORK OPTIMIZATION

PANEL DISCUSSION: LEADERSHIP & THE FUTURE

RECYCLEABLE PACKAGING

THIS IS HARD FOR THE CONSUMER

LINER EXCLUDED

CONFUSING - WHERE SHOULD THE PRODUCT GO?

WILL THEY EVEN READ THE LABEL?

HOW DO WE SIMPLIFY THIS?

HOW DO WE ENABLE RECYCLABILITY?

EDUCATION

FULLY RECYCLEABLE PRODUCTS

MAKE IT EASY

BE PROACTIVE RATHER THAN WAIT FOR DEMAND

LEADERS MUST:

- HAVE BUY IN
- STAY INFORMED
- MEASURE PERFORMANCE WITH MILESTONES

WILL THE LINER BE REPLACED BY 2050?

OR CODES?

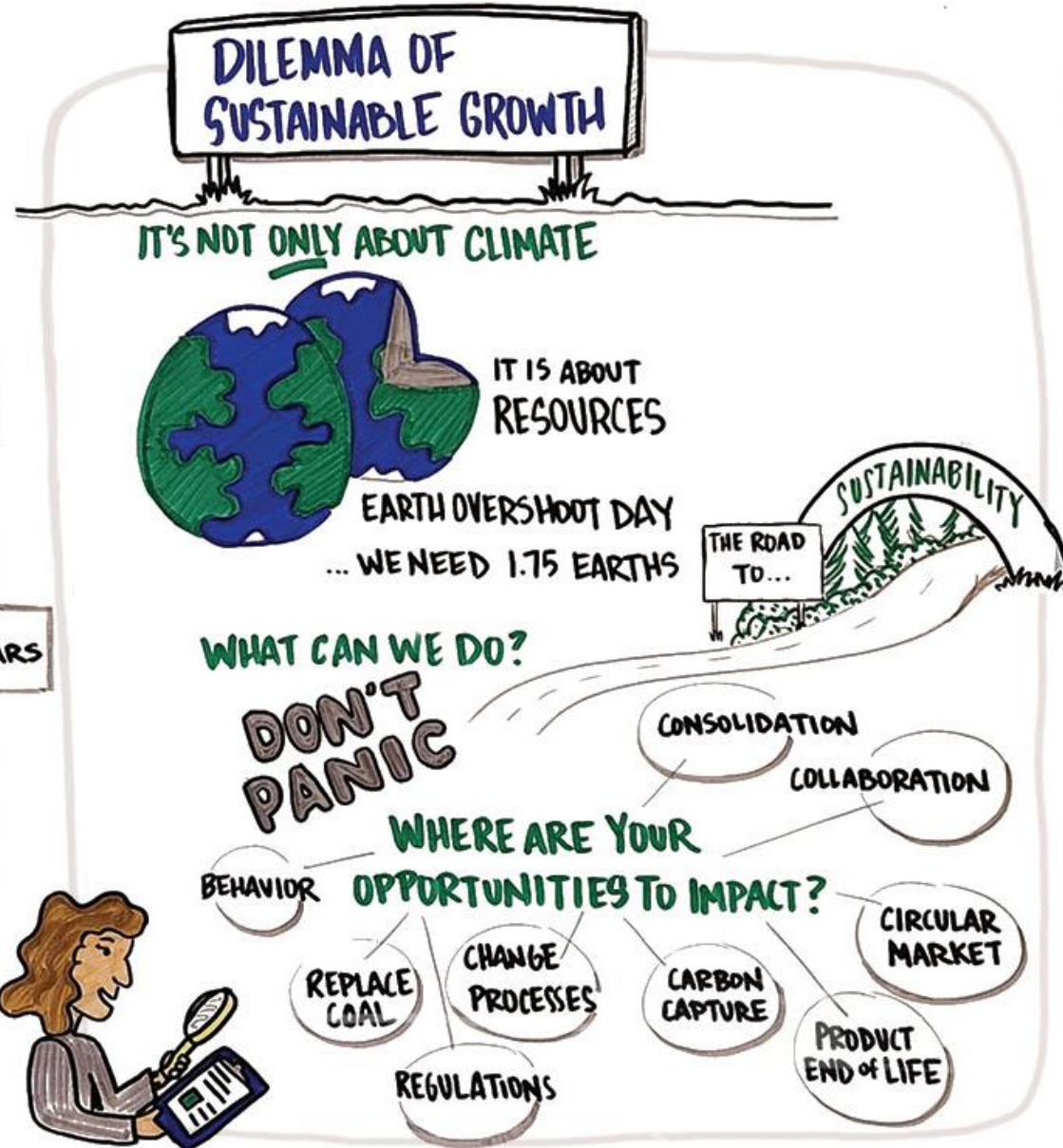
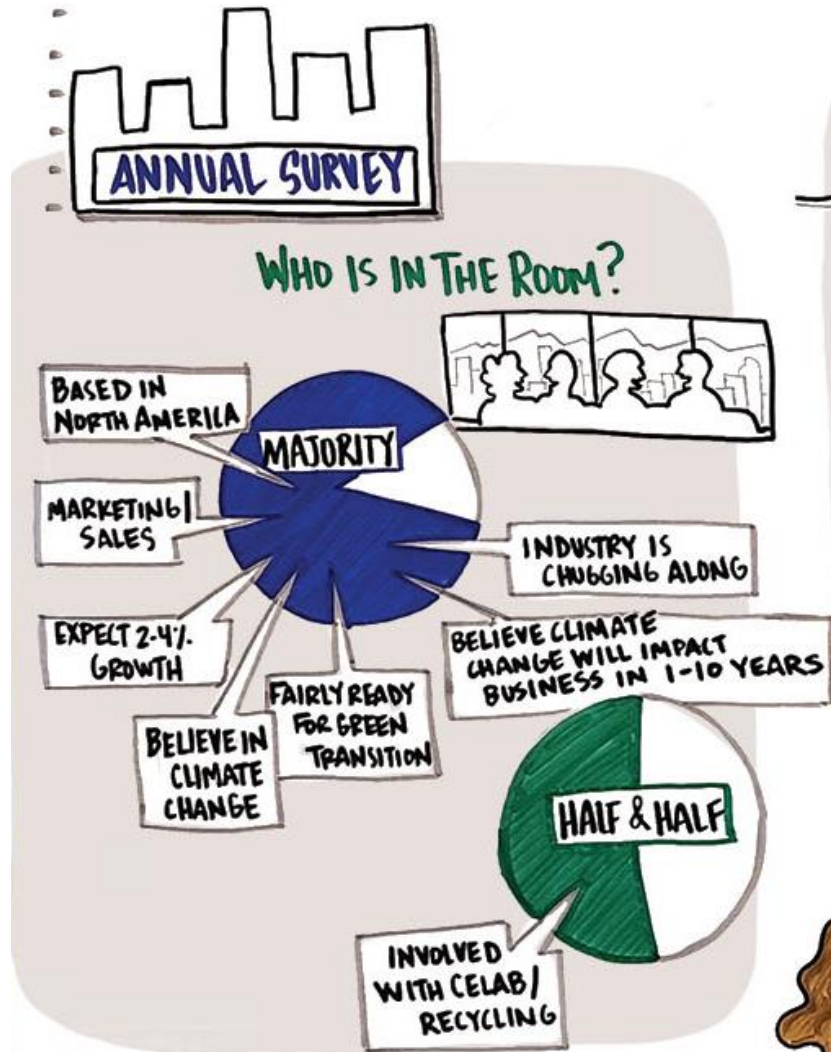
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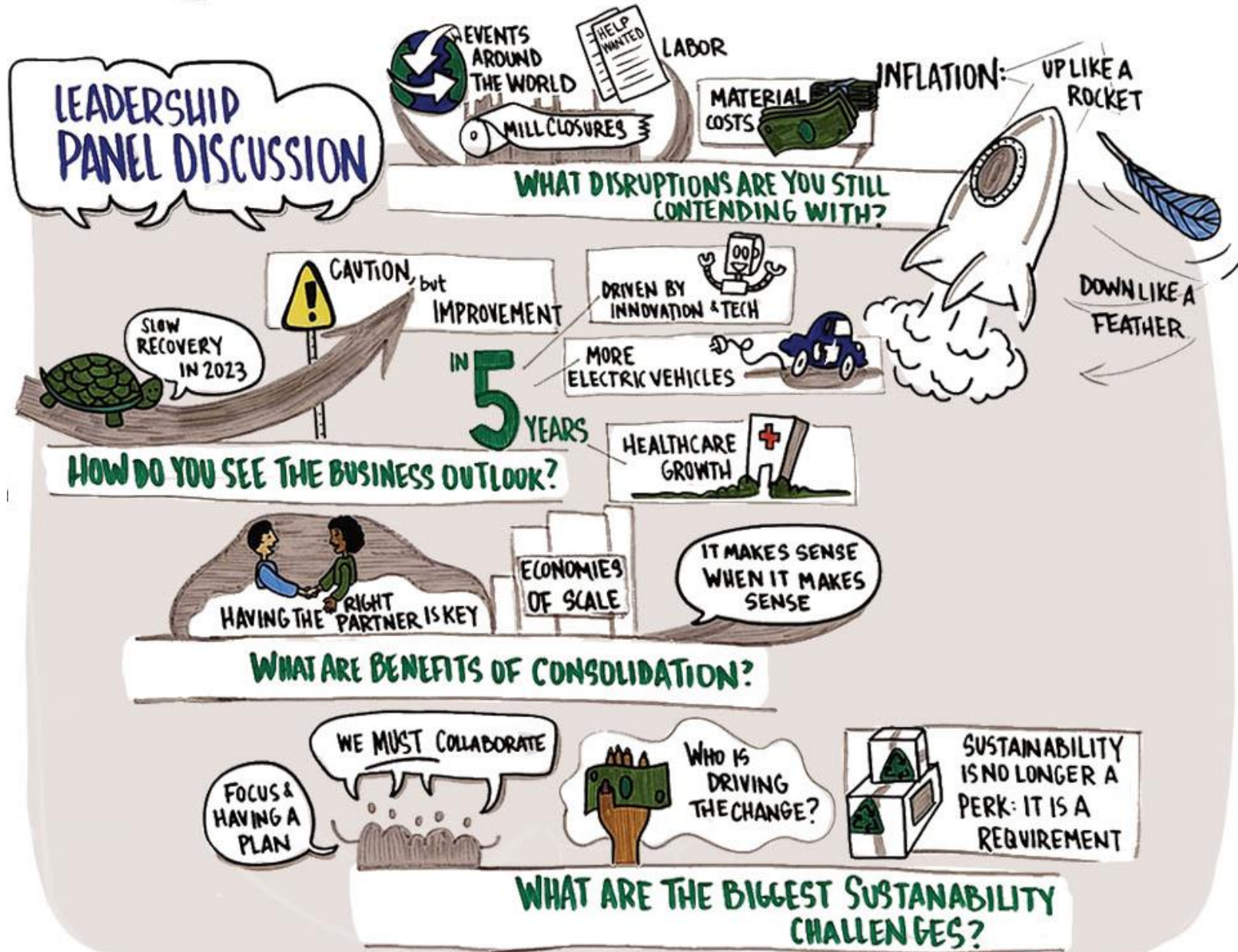
LINERLESS?

SHOULD IT BE REPLACED?

OR VIEWED AS A RESOURCE?

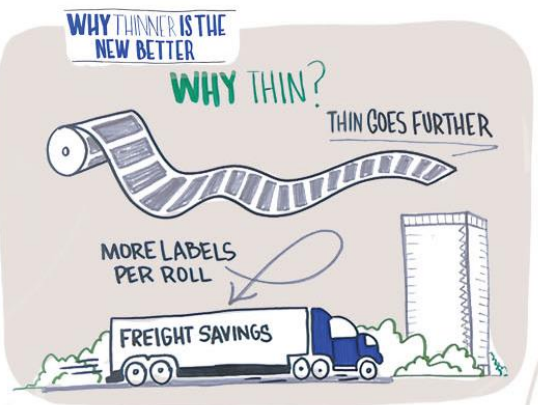
CHANGE BEING THE CAN DOWN THE ROAD





Live Graphic Recording:
noted by ellen

MARKET OVERVIEW



TAPES, ADHESIVES, LINERS



STATE OF THE PAPER INDUSTRY

MARKETPLACE
of UNCERTAINTY

WHEN IS THE BOUNCE?

I DON'T KNOW!

PRICE FLUCTUATION IS AN ONGOING STORY

MULTIPLE LABELS PER BOX

LOCATION CHALLENGES

E COMMERCE CONTINUES TO BE STRONG

HOME DELIVERY

THE SUPPLY

IS OFTEN FAR AWAY FROM

THE DEMAND

THE GOAL IS **GLOBAL ACCESS** TO RECYCLING

CELAB UPDATE

TASK 1
MAPPING

WASTE GENERATORS

RECYCLING NETWORKS

TASK 2

PARTNERSHIPS & COORDINATED OUTREACH

LOBBYING TO PROTECT INDUSTRY INTERESTS

MORE PROJECTS

EDUCATION
◦ WHAT CAN BE RECYCLED?

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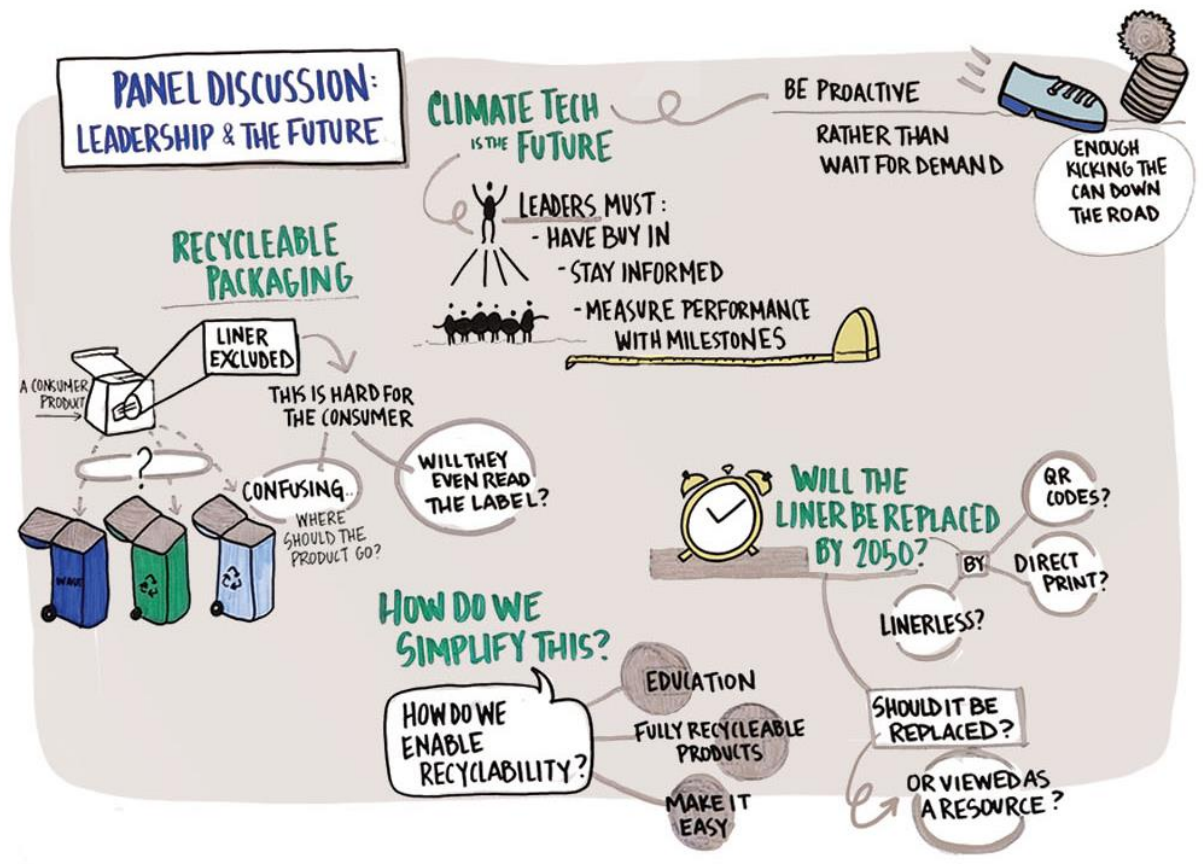
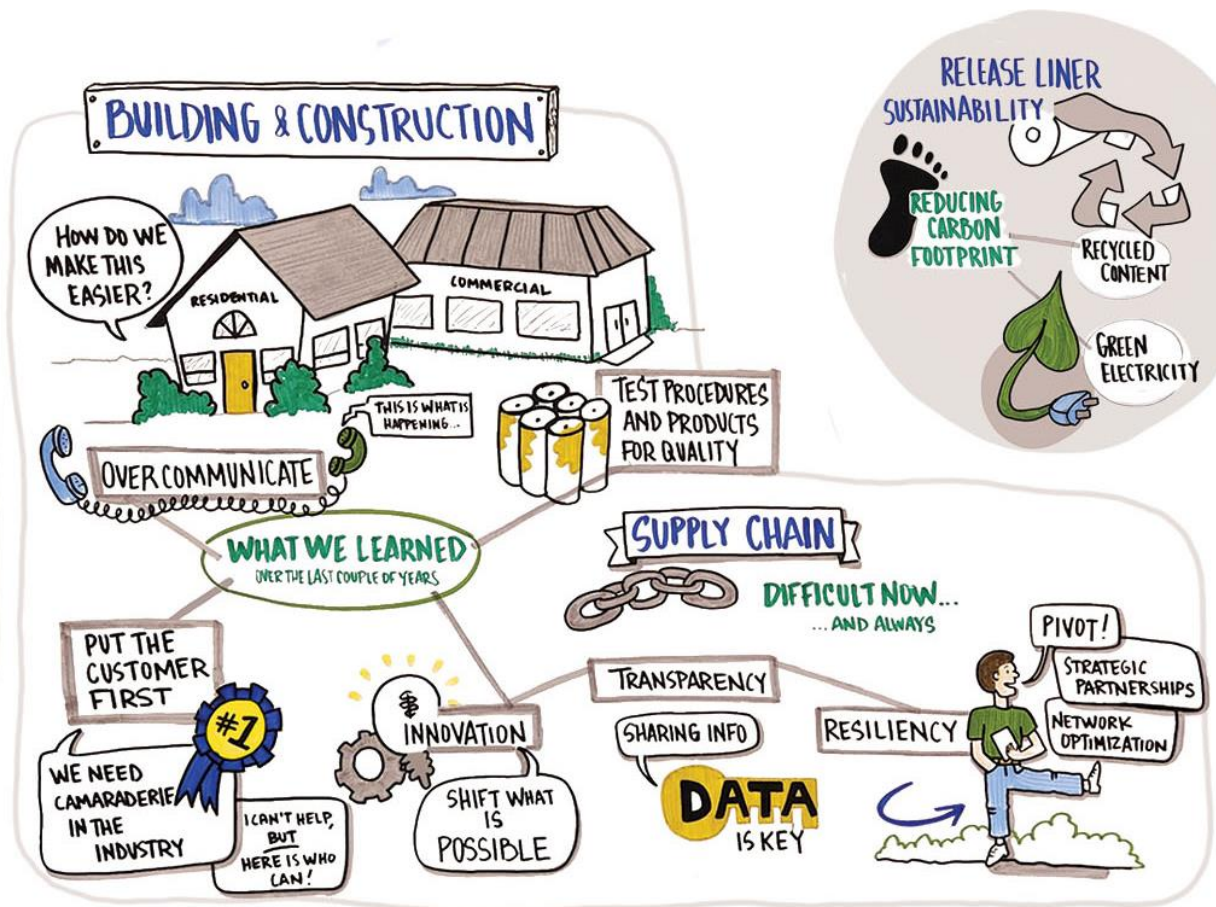
THERE MUST BE STAKEHOLDER BUY-IN

PET SUPPLY CHAIN

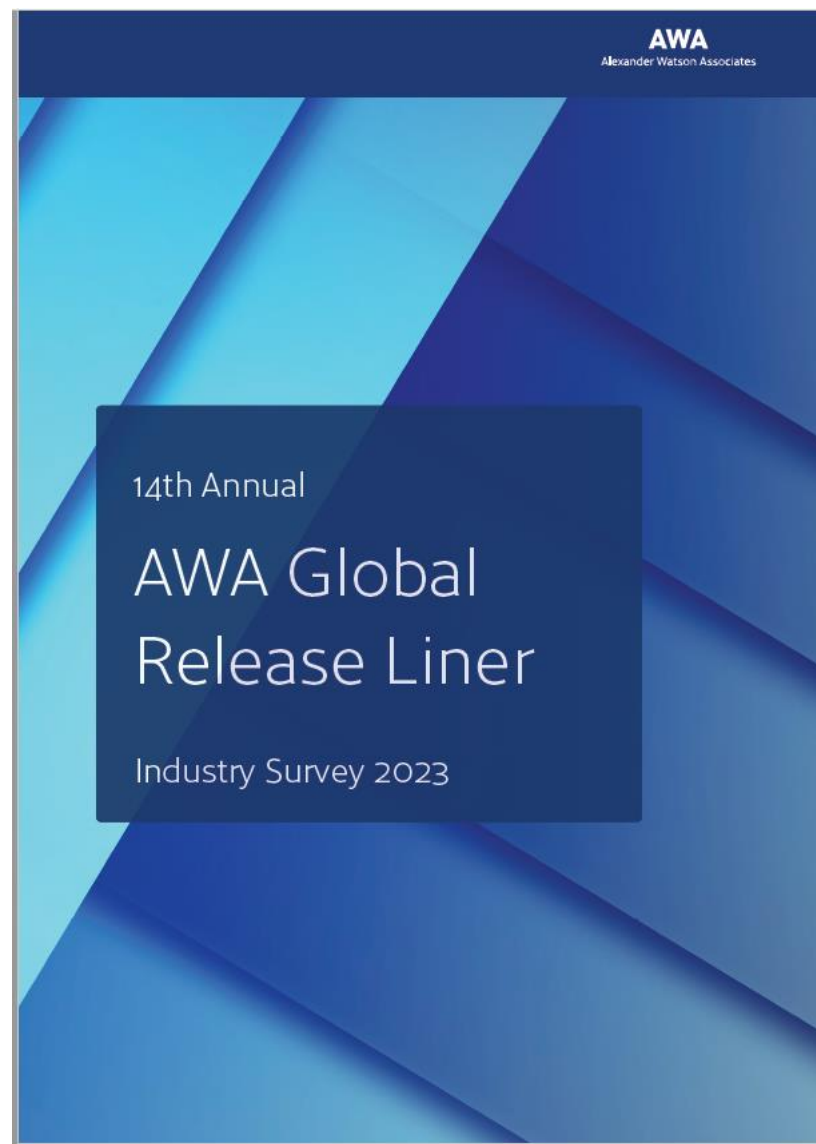
CREATE CIRCULARITY WITH THE SAME PERFORMANCE

CHANGE IN VIEW

SPENT LINER AS A RESOURCE RATHER THAN WASTE



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AWA Upcoming Events

AWA Pressure-sensitive Graphic Arts Industry Seminar

22 May 2023 | Munich, Germany, Co-located with FESPA

AWA International Linerless Label Conference & Exhibition 2023: Material, Converting & Equipment

12-13 June | Philadelphia, Pennsylvania, USA , Co-location with Home Delivery World

AWA Label Release Liner Seminar

12 September 2023 | Brussels, Belgium, Co-located with Labelexpo Europe

AWA International Sleeve Label Conference & Exhibition 2023

12-13 October 2023 | Amsterdam, Netherlands

AWA China Release Liner Seminar 2023

4 December 2023 | Shanghai, China , Co-located with Labelexpo South China

AWA Global Release Liner Conference & Exhibition 2024

See you March xx-xx 2024