



FINAT

Linking the Label Community

FINAT Webinar Series 2020

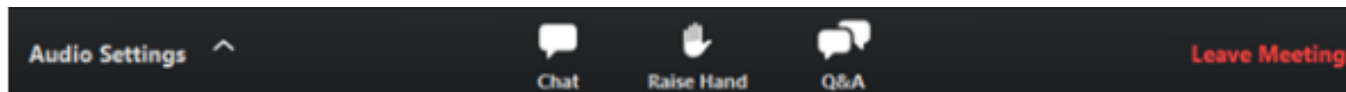
COVID-19 update for the label industry

16 April 2020 | Updated survey results as per 21 April

The association for the European self-adhesive labelling and adjacent industries

Some useful tips before we start:

- You have a control panel at the bottom of your Zoom screen.
- Questions can be asked by clicking on the Q&A button during the webinar. Your question will be answered during the webinar at the end of the presentation.
- Make sure to mute your audio line in case this has not been done automatically by the host.



Competition Law Statement

- We are here for the purpose of discussing the learnings and best practices in addressing the challenges of the Covid19 crisis. For this purpose we have put together an agenda. We will stick to the agenda and limit our conversation and the exchange of information to what is strictly necessary to achieve the scope mentioned in the agenda.
- We remind you that companies that have attended this meeting remain competitors in the broader scheme of things and operate independently. Attendance here is conditioned on your assurance and ongoing compliance with the requirement that none of you discuss with each other your commercial terms with any of your customers, or commercial terms that you have with your own suppliers, including without limitation prices, rebates, freight, volumes, territories, or any other competitive or potentially competitive terms.
- We need to avoid and prevent the exchange of competitively sensitive information, such as but not limited to: prices in the current market place (including any component of price, price levels, rates, discounts, rebates, costs etc.), allocating markets (by geography, product, customers), coordinating bid opportunities (pending or future), jointly boycotting any customers or suppliers or distributors, future marketing plans or strategies (including production volumes), R&D plans, sales forecasts, plans for territorial expansion or capital investment plans, customer-specific detailed sales information or terms of contracts
- Further please always follow your company's internal antitrust and competition policies. We expect you to consult with, and follow, your own company's policies and any guidance you may have received.



Pablo Englebienne
FINAT Regulatory Affairs Manager

1. Recap webinar 31 March
2. Update on developments
3. Deadlines for current measures
4. Survey converters results
5. Future considerations
6. Q&A

Recap webinar 31 March - General

- State of emergency and lockdown in most of Europe
- EC Green Lanes initiative: ensure free movement of goods across EU borders
- EC State Aid initiatives: financial support for SMEs
- Workplace safety: working from home (WFH), non-overlapping shifts, hygiene, Personal Protective Equipment (PPE), operational guidelines

Recap webinar 31 March - Concerns

- Recognition of packaging as crucial industry in member state
 - Explicit vs. implicit (supply chain/services for crucial industries)
 - National association declarations
 - Permit of circulation for workers (e.g., FR)
- Shipment of finished products
 - Delays at border crossings; Green Lanes not optimal
 - Difficult international transport conditions: risk of delays, fear of quarantines, lack of restaurants underway...
- Availability of raw materials
 - Adhesives, ethanol, isopropanol
 - Supply from outside EU hindered
- Personnel and services
 - IT infrastructure: availability, security



FINAT actions and relevant documentation

- [FINAT shared best practices and experiences](#) web page launched 13 March, updated daily – additional input to share welcome!
- 16 March Pablo joins FINAT as Regulatory Affairs Manager
- 18 March: FINAT endorsement of joint paper and packaging industry statements such as [Citpa](#) and CEPI [letter](#) to DG Grow
- [Presentation](#) webinar 31 March
- [Industry statement](#) by FINAT released 1 April
- Suggested [guidelines](#) to help identify essentiality of goods and services (in collaboration with Mike Fairley/Label Academy) released 3 April
- 9 April: launch of [Converter Member Quick Scan](#)
- 16 April: Covid-19 Webinar #2

Updates on developments

- Extension of lockdown
 - FR: to 11/5; BE,DE: to 3/5
- Restrictions being lifted
 - ES: construction, manufacturing resumed as of 13/4
 - DK: day care and elementary schools to open as of 15/4
 - AT: some non-essential shops open from 14/4; others to follow 1/5; restaurants mid-May
 - IT: some shops open; lighter measures expected from 4/5
 - DE: more shops open; schools will start reopening on 4/5
- Release of measures ≠ “back to normal pre-COVID”
 - Social distancing
 - PPE (e.g. use of masks in public)



Deadlines for current measures

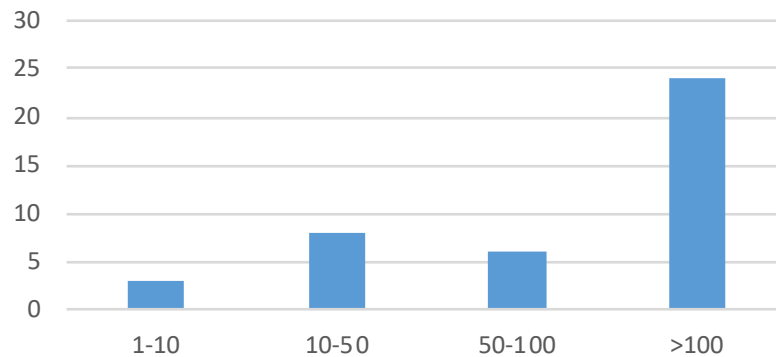
Country	DE	UK	FR	IT	ES	NL	DK	BE	AT	PL	GR
Deadline current measures	3/5	*	11/5	4/5	26/4	28/4	10/5	3/5	1/5	26/4	27/4
Update expected		16/4				21/4					

**UK did not set an end-date to the lockdown measures, but need to be re-evaluated every 3 weeks*

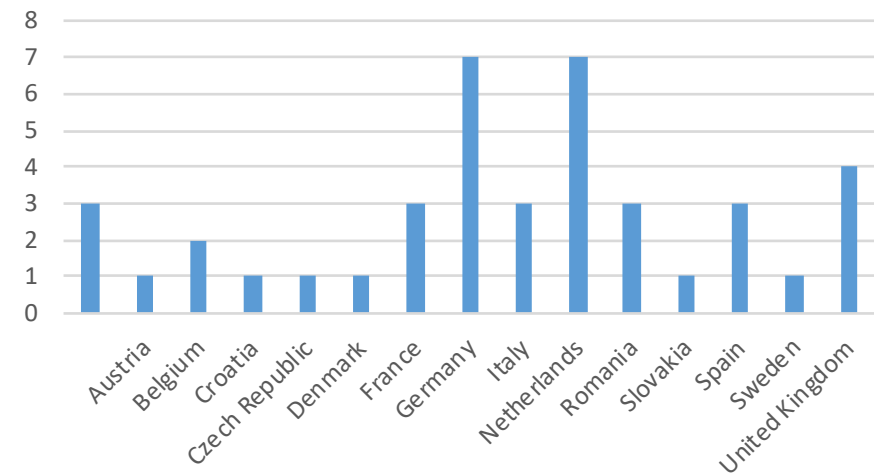
Survey converters

- 41 respondents from 14 countries

Company size

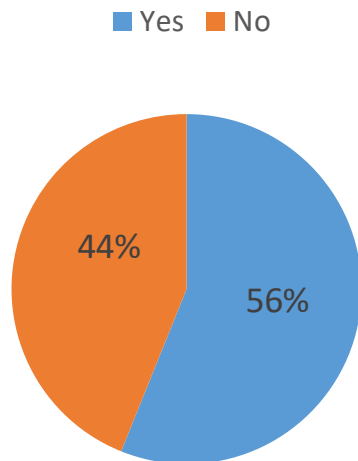


Country distribution

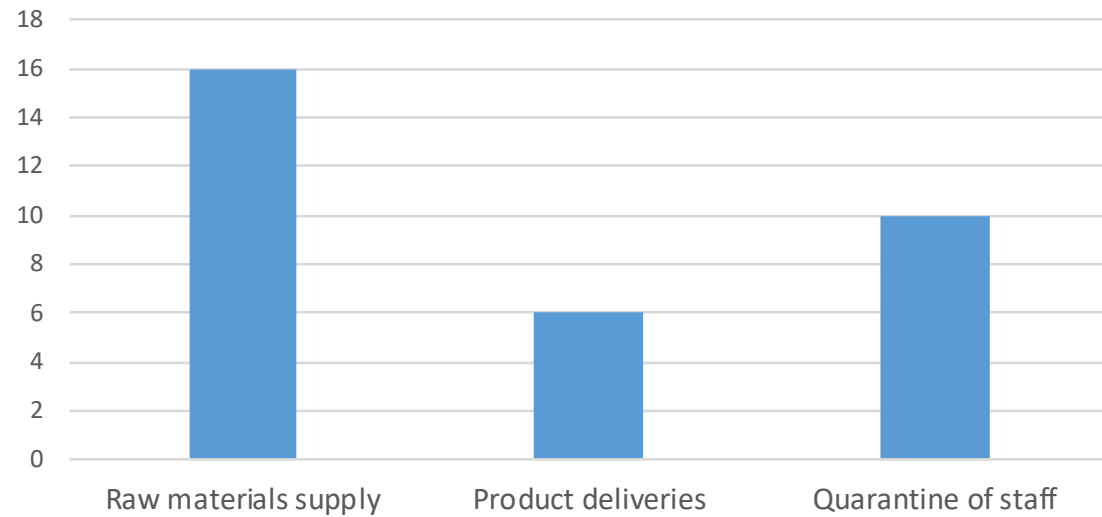


Converter production issues

Production affected since COVID-19 outbreak

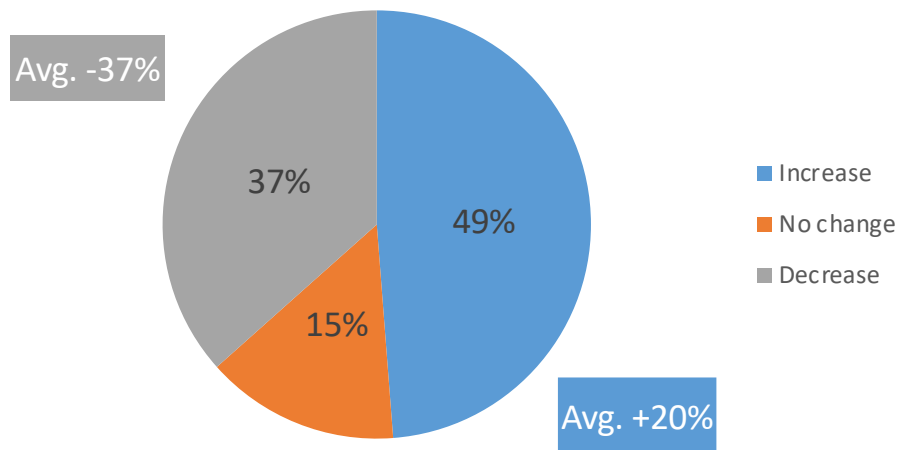


Production issues encountered



Some win, some lose

Total sales amount change since COVID



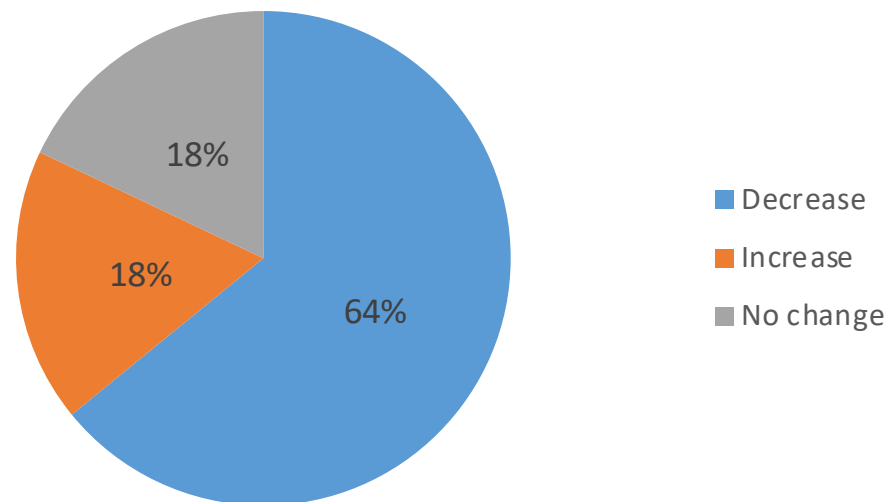
Sectors affected

Decrease: food, cosmetics, alcoholic beverages

Increase: pharma, food

Forecast is negative

Forecast 30-60 days



- Lack of financial assistance critical, short- and medium-term
- Positive outlook to seize opportunity to grow and improve
- Challenging to keep staff working safe and also motivated
- Issues with supply of consumables
- “The policies are excessive and will hurt us in the long run”
- “Can FINAT assure us that we will be able to continue to produce?”
- “FINAT should represent a solidarity link between companies in need of Disaster Recovery Plan”
- “COVID will not go away. Labels will not go away either.”

Your questions will now be answered on first come-first answered base.

Please use the Q&A button below

For further questions, please contact info@finat.com

The recording of this webinar can be found on the FINAT website (menu Knowledge – FINAT education) if not mentioned otherwise. All FINAT members can create their own profile and access restricted documents.



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Linking the Label Community

Many thanks for your attention!

The association for the European self-adhesive labelling and adjacent industries