Achievement 2009-2010

PAFA

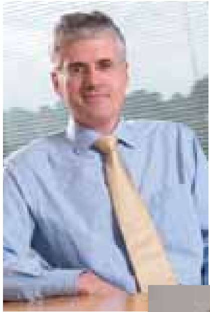
Packaging and Films Association Activity Review

inside...

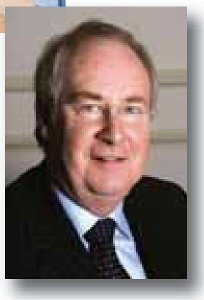
Top Line Changes

NEW CHAIRMAN AND CHIEF EXECUTIVE LOOK TO THE FUTURE

PAFA has introduced two top line changes which hold the promise of an even stronger future for the UK's lead trade association for film, flexible and thermoformed packaging. Stepping into the Chairman's role is David Beeby, Chief Executive Officer of Innovia Films. David has a long career in the packaging sector and has always passionately supported the industry in the UK and across Europe. He has been President of the FPA (the UK Flexible Packaging Association) which merged with PAFA in 2007 and has also been President of the European Flexible Packaging Association and Flexible Packaging Europe.



And new Chief Executive Barry Turner left the role of Managing Director at Britton Group to cut his teeth on one of the toughest jobs in the industry. He has been working alongside outgoing CEO David Tyson for the last six months in what has been described as a "baptism of fire" with more legislation, regulation and lobbying pressure facing the industry than for a long time.



David Tyson retires after a long career in the industry, culminating in what has been an outstanding contribution to the trade association and its members over the last five years. Further tributes to him can be found overleaf.

David Beeby said, "I am proud to take over Chairmanship of PAFA and I am determined we will continue to achieve so much more for our industry than individual companies can achieve. PAFA is a strong, single voice which has a reputation for being heard at the highest levels and I intend to build on this with the support of our newly appointed Chief Executive and a strong PAFA Board."

2020 Vision

PAFA PLAYS ITS PART IN PLASTICS 2020 CHALLENGE

The Plastics 2020 Challenge is an unprecedented move to shift the perception of plastics from "the problem" to "the solution". It brings together the resources, knowledge and experience of PAFA and the BPF with Plastics Europe – the Europe-wide association of plastics manufacturers.

Harnessing the power of modern communications such as the internet and fast-response media management, the 2020 Challenge is a commitment to work with Government at local and national levels as well as other agencies and NGO's to see an end to plastic going to landfill by 2020. It strongly promotes the "Reduce, Re-use, Recycle and Recover" mantra that is central to good environmental practice and represents a comprehensive new resource to promote the outstanding resource-efficiency of plastics and their enormous potential for re-use, recycling and recovery.

PAFA's Chief Executive, Barry Turner, has played a central role in the 2020 Challenge in recent months and heads up the communications and public affairs functions. "2020 is what the individual parts of our industry have been wanting for many years – a focused, continuous programme to dispel the myths and promote the very real benefits of plastics and plastic products. 2020 is already proving to be greater than the sum of the parts by changing the way plastics are perceived at every level," said Barry.

Plastics 2020 Challenge

Reduce, Reuse, Recycle, Recover

A great START

PAFA LEADS EUROPEAN SCHEME FOR RECOVERING AGRICULTURAL FILM

PAFA is playing a leading role in START - an innovation project funded by the European Commission. The project involves the development of retro-fitted dry-cleaning systems for agricultural film waste together with web-based software to reduce transport costs and improve the economics of recycling.

The European Agricultural sector generates more than 88,000 tonnes of plastic film waste every year but, because the vast majority is burned or landfilled, this represents the loss of a valuable recyclable resource - worth around € 264 million. The START project aims to replace current practices by boosting on-farm recycling technologies and reducing transportation impacts by up to 50%. One focus of the project will be to develop highly efficient methods for removing contaminants and separating them from the polymers.

The START consortium consists of 10 organisations from across Europe including 3 agricultural associations, 4 small enterprises, 1 large enterprise and 3 research and development institutes. This is a three year project and continuous updates will be posted on the PAFA web site as well as at: **http://www.start.uk-matri.org/**

Activity Review of PAFA's work on behalf of its members

PAFA's Climate Change Deal Reaps Rewards for Members

The current Climate Change Agreements set up by PAFA - which have saved members £4.5million through climate change levy rebates - will come to an end in 2011. So PAFA is working hard to respond to the second stage consultation process to ensure the scheme continues until at least 2017. Currently 64 PAFA companies operating from 78 UK sites joined the PAFA scheme and have worked to cut energy by making efficiencies and technology improvements.

PAFA's Chief Executive, Barry Turner, urged members to log on to the members' area on www.pafa.org.uk and read the consultation. He said, "You don't have to be a PAFA association member to join our CCA scheme as it is a separate entity. However, our members do get discounted fees when joining and every subsequent year - and there is real benefit to be gained with each site receiving substantial rebates. At a time when the economic situation brings its own pressures, it would be economic madness not to take part in the scheme."

PAFA's Views felt in Scotland, Wales, London Assembly and Westminster

Over the last few years, in addition to ongoing consultation with Government departments, PAFA has presented its views on behalf of members directly to the Parliaments and Assemblies of Scotland, Wales, London and Westminster. The presentations have varied from lobbying against plastic bag taxes to the big issues of resource efficiency, recycling and waste management.

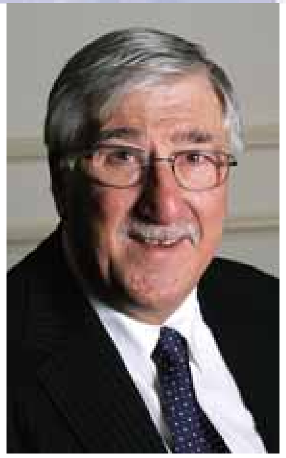
Whilst considerable success has been achieved, the Association is determined to continue its relentless battle against misinformation and misguided "greenwash" against its products. One way that PAFA can be even more incisive in its dealings with elected representatives is to gain the support of every MP, MEP, SMP or AM which has a constituency with a member site located in it. In the near future, all members will receive a questionnaire asking for this basic information. By responding quickly, you can make sure your MP is on our lobbying radar!

Courtauld 2 – a Step in the Right Direction

PAFA welcomed the recent admission by WRAP that 'it's no longer enough to look at the impact of packaging alone'. But whilst the new target for food waste - and the move toward a more comprehensive review of the impact of grocery products on the environment - is broadly welcomed, there is a danger that, unless carefully implemented, ill-informed decisions could still be made under the current proposal.

"Although the vital role of packaging is now acknowledged by Courtauld, I believe this latest proposal could still risk packaging being changed in a way which could increase food waste. And at the end of the day food waste has a much higher carbon impact than the packaging that protects the food", said PAFA Chief Executive, Barry Turner.

PAFA points to the example of multilayer films used to protect meat from deterioration. In such circumstances, the packaging impacts can typically be as little as one fiftieth of the meat it protects. The Association hopes that, despite the launch of Courtauld 2, WRAP will quickly start to evolve its successor so that industry and retailers can start planning with some certainty. The Association says it anticipates a far more holistic approach will be adopted for the next round of Courtauld by considering the total resources used in the life of grocery products. PAFA pledged to help ensure that future agreements would draw heavily on work being done internationally and place the least possible burden on business in the need for reporting and administration.



Tributes to Tyson

ACCOLADES POUR IN FOR RETIRING CHIEF EXECUTIVE

After five years of total commitment to PAFA, retiring Chief Executive David Tyson has received some remarkable tributes to his unstinting support for the industry from across the UK, Europe and even further afield. "A quite outstanding contribution – his selfless support for PAFA has made a unique difference to the way the association sees itself and is seen by others around the globe" was the message from immediate past Chairman David Read speaking from his new base in Atlanta.

"An exemplar of exceptional trade association leadership through a combination of conviction, commanding presence and the gentle persuasion which is unique to David," said PAFA Director Ian Bone. "A unique man with the ability to get right to the heart of an issue and get things done whilst still remaining everyone's best friend," said ex PAFA Chairman, Dick Searle, now Chief Executive of the Packaging Federation.

Whilst David spent six months recuperating from a difficult heart operation, it did have one advantage. It helped him get used receiving accolades - as hundreds of messages wishing him a speedy recovery were sent to his bedside.

But even when back on his feet, David saw little time for rest and recovery as he kept his promise to help incoming Chief Executive Barry Turner settle into his new post. This meant an often gruelling schedule which took them all over the UK to meet PAFA members and Government contacts on their home ground. "David has given me amazing support and has helped me come to grips with an incredibly complex job. He has never shied away from giving help and advice. I cannot praise him enough", said Barry Turner.

With typical modesty, David said, "I'm genuinely moved by the messages I have received, by their warmth and the depth of feelings expressed by people I have met and worked with for over 40 years in this industry. It's been a great career in the industry and I am determined to stay in touch with as many people as I can. At the same time, I now feel it's time to give a bit more time to my devoted wife and family. Whether they can put up with having me around more is another question!", said David. (See David Tyson's last Report as Chief Executive on Page 3)

Get Real on Recycling

PAFA JOINS FORCES TO FIGHT UNREALISTIC RECYCLING TARGETS

As the UK's lead trade association for the £2 billion plastic packaging industry, PAFA has hit out at new recycling targets. It says that the Government risks setting unachievable targets before ensuring there is the infrastructure in place to make recycling more efficient in the UK.

In a recent statement, mirrored by many trade associations, PAFA's CEO Barry Turner said, "We have participated positively in consultation at every stage so far. In fact, we have helped bring together those in waste management at a local council level with the recycling and reprocessing sector to work on overcoming the obstacles that stand in the way of higher plastics recycling. We have also actively sought ways of preventing contamination rates increasing even further. But our calls for joined-up thinking coupled with major investment in local collection infrastructure appear to have fallen on deaf ears with the announcement of a 56.9% plastics recycling target by 2020."

The new UK targets are higher than any other European country, in spite of the fact that others have achieved far more consistent collection and sorting methodologies at local level. In the UK we have a widely disparate approach from one local authority to the next and even borough to borough in London. PAFA says this is because the UK has not sufficiently encouraged local authorities to operate to a consistent collection strategy supported by well-invested sorting facilities. The Association maintains this is a crucial prerequisite if we are to succeed in providing the uncontaminated materials required to feed good quality recycling markets. "The result is that we are way behind in recycling infrastructure yet targets are being set which are higher than across Europe", said Turner.

Mixed plastic films used in the majority of retail packaging, and which are essential to protect products from wastage, suffer higher levels of contamination in the waste stream and, according to a recent WRAP report on MRF Quality, are left to the end of the sorting process at most Municipal Recycling Facilities. The Association also says that, whilst local authority recycling targets continue to be driven by weight, plastic as the lightest packaging material will always be the last priority for council collection and sorting.

Appealing for an urgent rethink between recyclers, central and local government, Mr Turner said, "We need strong leadership from Westminster linked to serious investment in UK recycling not only before we can move towards achieving better recycling rates but if we are to have any chance of developing a stronger UK recycling industry."

Chief Executive's Report on the Past Year

2009 RISING TO THE OCCASION

The challenges were clear for our Industry as we entered 2009 and the scale of the economic crisis did not disappoint in its intensity. Although we were not able to deflect all the blows the down-turn delivered, we saw yet again that our industry had the management skills, resources and the commitment of workforces to tackle such challenges. We saw significant differences across member companies, dependent on their market sector. Not surprisingly, those closely aligned to the construction and motor industries saw the worst effect, with some experiencing initial demand reductions in the order of 50%. In contrast, however, those supplying products into consumer markets - particularly in the food industry - generally fared better. Indeed, after the initial economic shock and consequent de-stocking took place, we saw a gradual recovery in demand throughout the year - albeit not to previous levels – a better position than many expected.

Companies recognised there was little point in chasing non-existent demand and focussed on tuning their operations to more realistic volumes whilst working to ensure their long-term survival. An inevitable head count reduction was kept to a minimum by more flexible working practices by employees. Exceptional courage has been shown in the way our industry continued to invest in new equipment - a mature outlook which recognised the future benefits of harnessing the latest technology to achieve the highest standards of quality and innovation.

Very few industries have to deal simultaneously with the challenges of the economic crisis and misguided environmental attacks on products which in reality support the safe and hygienic supply of goods. There is much focus on flexible packaging when it reaches its "end of life" but there is little understanding outside the retail supply chain of the contribution it continues to make in reducing food waste and minimising the use of resources. Sometimes the perpetual focus on recycling misses the bigger picture of the real benefits that come from the flexible packaging. Much of the Association's time and resources have been spent on trying to correct these misconceptions, for example by working with our colleagues on the 2020 campaign which is beginning to get across the message that modern society would be a poorer place without our members' products. PAFA continues this debate with senior ministers and we are regularly consulted and asked for our views and opinions when Government is formulating policies and regulations that affect us.

Currently we are responding to Government on consultations regarding the proposal to introduce a Producer Responsibility Scheme for Farm Plastics Recovery. Also, the Packaging Strategy is very much in our focus in view of the effect it will have on members. The current Climate Change Agreements will come to an end by 2013 and we are supplying information to DECC to seek an extension to Climate Change Levy Rebates going through to 2017. These are awarded in exchange for companies achieving targeted energy reductions through significant capital investment. The current schemes will have saved members around £6 million by the end of 2013, demonstrating the strength of a sound trade association supporting its industry. Indeed, it is gratifying to see that through the difficult period of 2009 PAFA continued to attract new members who recognised the role PAFA plays in defending their businesses and markets.

LOOKING TO THE FUTURE

Although the UK has technically come out of recession, economic conditions will not change overnight - with weak economic growth likely for some years. UK businesses need to reinvent themselves to survive and they must accept that the world is changing on a permanent basis.

Our members have coped with so many challenges over the years and in particular the cumulative effect of the economic and environmental challenges throughout 2009. They are now faster to adapt and more willing to grasp new techniques as they develop new business models. This will ensure their survival.

Key areas to be considered for the future are that credit terms will not fall back to pre-crunch levels and businesses should continue to be wary of higher debt levels. Companies will find alternatives to debt-driven growth to protect investment and innovation.

Companies that do survive will have to re-examine their approach to working with partners, ranging from suppliers to universities, to bring out the greatest opportunities from technology and innovation. The domino effect of supply chain failures like those in the banking industry will compel firms to forge more collaborative supply chain relationships. Sustainability and ethics will continue to become more integrated into business to improve accountability and corporate citizenship in order to retain customers and staff.

As we have seen recently, a more flexible workforce will evolve supported by new technology and training and companies will build on their human resource investment to benefit as recovery progresses.

It is imperative that we keep a sense of perspective to ensure we do not become completely defensive as an industry but recognise the opportunities in front of us and move forward when it is right to do so. Our industry has already demonstrated the management skills and resources and the commitment of workforces to tackle the challenges ahead. Dealing with the issues of today will prepare us very well to maximise the benefits of the future.

As your trade association, PAFA will support you in every way it can. I urge all members to utilise the support facilities we offer and would encourage non-members to join us so that we may understand and communicate your needs to help achieve the success you strive for.

PAFA IS ITS PEOPLE

The strength of PAFA is the commitment, focus and contribution of so many people to ensure that we have an effective route to defend and promote our products, as well as to secure the best business climate in the UK we can possibly achieve. We also need to constantly remind UK Government that other countries and regions are attempting to attract the investment our businesses need in the UK. Without a realistic "Business Friendly Environment" we cannot achieve the progress we have shown in the past
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During the first half of 2009 our Chairman, David Read, returned to the USA which was a great loss to us but we have been incredibly fortunate in securing the support of David Beeby, CEO of Innovia Films, to become our new Chairman. He not only brings with him an extensive business perspective but also significant trade association experience as a former President of Flexible Packaging Europe. May I also pay tribute to the tremendous support from members and associate members in finding time from demanding business schedules to attend our meetings and extend the knowledge and perception of our industry both internally and externally. This allows us to communicate to the outside world the benefits our products bring and the responsibility the industry shows. Your inputs are greatly appreciated.

The PAFA management team represents senior management across all sectors of our industry. The knowledge and dynamism they bring creates the energy and enthusiasm needed for a trade association to deliver value for its members. I greatly appreciate the counselling, advice and commitment they show and in particular the continued support and influence Martin Unwin has contributed.

Our Minutes Secretary, Philip Bradburn, retired at the end of 2009 and I would like to thank him for his dedicated support over the many years he has recorded the minutes of our meetings. I am pleased that the team at P R Principles continue to support us in actively promoting our industry. Their understanding and experience of the issues we face is fundamental to managing our public image.

Always the unsung heroes of any organisation are the administration team and I thank Fiona and Sandra for their significant contribution in keeping the organisation running under the watchful eye of the management team during my extensive period in hospital. The expert consultants we work with are also an integral part of our success and I thank them for their expertise during 2009 and for the future.

As most of you know, I will have retired at the end of March 2010 as this publication goes to press. I would like to sincerely thank everybody from all quarters for helping and encouraging me over the last five years in my duties as Chief Executive of PAFA. There have been some very challenging times and tough issues to tackle but I have enjoyed my period with the association immensely. We have truly made a difference by working so closely together for the common aim to improve the industry's profile and status. Unfortunately, we still experience attacks on our products and there often appears to be a stubborn determination not to recognise the contribution our products bring to society, its health and well-being. So we must continue our efforts for members.

My working life has been devoted to the plastic and flexible packaging industry but I could not have known that eventually its products would be fundamental in saving my life. I have reflected on this during my recent hospitalisation where, along with others, I was extremely pleased to witness at first hand the value of our industry's innovation. The laminate pouches used to supply fluids and antibiotics, plastic tubing feeding veins, packaging for wipes, gloves to protect from infection, plastic bags and aprons as a barrier to cross-infection.

Whilst I would not wish the circumstances which demand their use on anybody, I do wish that some of the people who knock our industry would really take time to consider how much life relies on our products.

When I notified the Management Committee of my intention to retire, my greatest concern was to ensure that my successor would start in the best position to build on the foundations I, Martin Unwin and my predecessor Jim Pugh had worked so hard to create. I need not have worried. Your new Chief Executive, Barry Turner, has "grasped the nettle" of the association and is already working tirelessly in our members' interests. He already shows determination that our industry will not be railroaded by misguided environmental agendas but should be seen as a shining light for its professionalism, environmental credentials and responsibility in striving for the highest ethics of business. I wish Barry, and everybody in the industry, the success you surely deserve for the future. I will miss your valued friendship and advice on a daily basis but hope we can keep in touch in the long-established spirit of an association that has achieved so much through the close bonds of its members.

David Tyson

Earning our Recovery

CHAIRMAN'S REVIEW

In the past year, trading patterns across member companies have varied enormously depending on their exposure to the automotive, building, construction and durable goods industries – all as a result of consumer reactions to recessionary fears. Members supplying the food industry were least affected.

As a result, volumes for members were down in 2009 in tonnage terms and sales turnover was further down due to selling prices falling as raw material prices fell back. Conversely, those same reductions in raw materials, due to the lag effect, did allow earnings to recover somewhat from 2008 and for this reason, despite lower sales, many members were able to record a recovery in earnings in 2009. However, despite demand remaining relatively weak, raw materials costs have increased again reflecting tight supply coupled with the weakness in sterling commencing in the second half of 2009 and continuing into 2010. All of this is causing some in the sector to become cautious in their outlook - especially as the food retailers wrestle with a slowdown in growth. This uncertainty is made worse by the uncertain political/economic outlook in the UK, exacerbated by the enormous public debt that the nation has to grapple with.

In response to recessionary pressures, some larger companies with multiple sites took steps to close smaller and less strategic locations and, of course, the year was punctuated with the announced takeover by Amcor of Alcan's global pharma and tobacco businesses as well as Alcan's food businesses in Asia and Europe.

Despite all the turmoil in the economy, it was pleasing to see the industry make further progress on health and safety with companies returning data showing a 23% reduction in the incident rate and a 24% reduction in lost time per employee.

Membership of the trade association did increase during the year and is expected to continue to do so in 2010 as businesses need support in responding to the many challenges facing our industry. The challenges range from technical standards to legislation and the demand for greater use of recyclate and recycling as the debate about sustainability continues.

The year was one of significant change for the trade association as David Tyson announced his intended retirement from the CEO role in 2010. As a result, the association initiated a search for a replacement and a number of excellent candidates surfaced. As a result of this rigorous process, Barry Turner was appointed as PAFA's new Chief Executive. Barry has many years experience in senior positions in both public and private companies supplying both packaging machines and materials and has now thrown himself into the role with great commitment.

On the lobbying front, government activities started to step up through the year as it became apparent that there was to be an unprecedented spate of consultation documents issued in the run up to the election. Our anticipation proved correct, with consultation documents issued on agricultural waste, the Courtauld Agreement stage two, packaging recycling targets, landfill bans, proposed energy saving targets for the CCL to name just a few. Also, work is presently underway with consultative groups concerning bio materials, energy from waste, a new polymer qualification and a new industry sector health and safety initiative.

We are now well into the industry-wide 2020 Challenge a campaign which is aimed at demonstrating how plastics are a crucial part of our sustainable future. Many consumers still feel that packaging is unnecessary and it is important that the role of packaging in protecting, reducing spoilage and extending life is fully understood by all. The most stark contrast is the use of multilayer film in meat packaging and its role in food waste reduction - where the carbon impact of the film is one fifth of the product it protects. In similar vein, it will be interesting to see, wherever rigid packaging has been removed from products such as Easter eggs, what happens to spoilage levels both in transit and in storage and if this offsets any saving made by removing the protection afforded by the rigid shell.

Finally, I would like to thank David Tyson for his unstinting efforts for our trade association over the last five years and in all the years, as a member, that he was a solid supporter of PAFA. He has worked tirelessly to ensure members do not get saddled with inappropriate legislation and to ensure they continue to benefit from PAFA's advice and support when required. Together with the entire management team, I would like to wish him the very best in his retirement. At the same time I welcome Barry Turner to PAFA, thank him for taking on the responsibilities and challenges that come with the job and wish him every success in his new role.

David Beeby

Aftermath of Global Crisis

FILMS & POLYMER LIAISON GROUP

Polyolefin resin market review 2009

After the price collapse in Q4 2008 - in the aftermath of the global financial crisis - polyolefin prices climbed by approximately 30-35% from January through December 2009. Resin prices were quite volatile during the year, being largely driven by changes in the oil price and the level of producer-held polymer inventories. Resin producers reduced polymer stock levels significantly due to working capital considerations making the market much more sensitive to short-term changes in supply/demand. Furthermore, the switch from quarterly to monthly pricing for ethylene and propylene feedstocks at the beginning of 2009 heightened the role played by raw material costs in determining polymer prices.

The long expected "tsunami" of resin imports into Western Europe did not materialise in 2009. In fact, additional PE and PP imports scarcely played a role in the European market for most of that year. So what happened? Was Europe suddenly immune to cheap polyethylene and polypropylene imports?

Using PE as an example, three factors postponed the "tsunami":

1. **The first reason is that PE projects in the Middle East have experienced on average between 7 and 8 months delay in getting production rates to an acceptable commercial production level. Roughly 4 million tons of additional new PE capacity could have been producing already at the end of 2008 or early 2009.**
2. **The second reason is that PE imports into China jumped dramatically in 2009 with year-to-date imports of 4.8 million metric tons as compared to 3.1 million metric tons for the same period in 2008. This represents an increase of around 56%.**
3. **The third reason is that, for most of 2009, exporting polyethylene from the Middle East has not been economically attractive. This started to change in September 2009 with prices dropping in Asia and climbing in Europe.**

Although the "tsunami" did not happen in 2009, it is still on its way. Resin producers' margins are expected to come under increasing pressure. Further polyethylene plant closures will be announced but this change in market dynamics is expected to benefit film producers in the future.

Capacity additions for HDPE, LLDPE and PP similarly are increasingly outweighed by closures or have been postponed by several years. The exceptions are smaller de-bottlenecks or scrap and build projects that replace older existing plants with more modern, larger facilities. As yet unannounced, hypothetical capacity closures are forecast to further reduce polyolefin capacity by around 8.5% from the 2009 level over the next three years. The region's nett trade position continues to deteriorate. While a large trade surplus in polypropylene will begin shrinking rapidly, initially small deficits in LLDPE and particularly HDPE are growing rapidly. LDPE with a steady net export position of over 500 thousand metric tons constitutes an exception with shipments going primarily to Central Europe and Africa. 2010 will likely be characterised by continued low demand levels, uncertainty regarding polymer prices and increasing imports of certain polymer types from the Middle East.

I would like to thank Mike Smith of CMAI Europe for his very informative presentation at our meeting in December and his help in writing this report. For those PAFA members wishing to get a better understanding of how the olefin market operates, please contact Mike Smith at CMAI Europe GmbH. Tel. +49 211 71008112, e-mail msmith@cmaiglobal.com

Films and Polymer Industry Liaison Group meetings

During 2009 a joint meeting took place with the Flexible Packaging and Thermoformers Group. Many of the subjects traditionally covered in meetings are also common with other PAFA groups and it was felt that a combined meeting would deliver maximum value to members in terms of content and use of time. The meeting held in December was undoubtedly a great success with over 50 members and associate members attending - a record for a sector meeting.

A general industry market review gave a rather mixed picture in 2009. Members supplying niche and added-value markets appeared to perform better than those in commodity markets. This was despite the fact that nearly all market sectors reported lower volumes. Encouragingly, there appears to have been some new investment in the UK in 2009, but mainly in SME's.

Industry trading results from the Flexible Packaging Group showed a recovery in profits in Quarter 2 despite no growth in sales. However, members do report an increase in export sales due to the low value of the pound. The industry also appeared to have made substantial cost-savings and increases in efficiency in order to adapt to very challenging market conditions.

PAFA continues to represent our industry by involvement in Government initiatives. At a time when the Government is looking at introducing a mandatory requirement for recycled content in packaging, and proposing very high recycling targets to apply to the plastics industry, PAFA continues to argue that these targets are unrealistic in terms of the economic impact on our industry and the availability of adequate waste collection systems.

The Government continues to have the environment firmly on its agenda. The Carbon Trust is now offering interest free loans for projects that improve energy efficiency. The loan covers any equipment that generates an on-site fossil fuel energy saving up to a loan value of £500,000. The idea is the loan is paid back with the savings achieved.

Finally, I would like to thank all of our members and associate members for their commitment in attending meetings - and our guest speakers who contribute so much added-value. I wish you all a successful 2010.

Andrew Chappell

PRAGmatic Tool for Sustainability

SUSTAINABILITY GROUP

The year was an active one for PAFA's Sustainability Group, requiring involvement in a number of significant programmes and issues which will impact on our members' companies and their business prospects.

The Packaging Recycling Action Group (PRAG) completed the development of a tool for the design and selection of packaging, with emphasis on the consideration of recycling potential. This guide was published at the end of 2009 and will be used by the product managers and buyers of our major retailers to help determine their selection criteria for product packaging.

Whilst all major sectors of the packaging industry are involved in PRAG, it is clear that plastic packaging remains a target for many activists. It is pleasing to report, however, that, in spite of the lack of any real structure in the UK to the handling and recycling of mixed plastics, plastic packaging was generally portrayed with due recognition of the considerable environmental benefits it offers.

Also emerging from PRAG was an understanding of the relative merits of the various tools being marketed to determine a carbon footprint for each of the alternative packaging materials. This in turn was expected to form the basis of the forthcoming Courtauld 2 Agreement. As part of this process, some nine separate computer programs being marketed to assign carbon values were evaluated by PRAG. It was therefore interesting, or perhaps worrying, to report that none of these programs offered any real transferability or compatibility between each program. Most importantly, each produced differing carbon values for the same pack.

As the Government's waste recovery agency, WRAP still moved forward with their revision to the "weight-based" Courtauld Agreement. The aim was to set new target levels capable of reducing the carbon impact of grocery packaging by 10% by the end of 2012 - against a 2009 baseline. The expertise within PAFA's Sustainability Group was crucial to help the trade association push back on some of the more unfavourable and unjust assessments of Full Life Cycle Analysis of plastic packaging.

The PAFA Sustainability Group Work also worked with one of the country's major retailers on a programme to help position themselves in advance of the introduction of Courtauld 2, helping determine their own properly considered response and strategy on carbon footprinting related to packaging materials.

The Sustainability Group is a valuable expert group within PAFA which utilises its knowledge and resources to help the credentials of plastic packaging be better understood and valued. This is particularly important in an environment where public opinion as well as national and regional government have agendas which are very often not based on scientific reality.

Members wishing to be more actively involved in these important Sustainability Group activities are encouraged to contact PAFA's CEO to indicate their interest.

Ian Bone

Food Packaging Protects against Recession

THERMOFORMING GROUP

The thermoforming industry was not too heavily affected by the recession as a high percentage of formings goes into food packaging, with food purchases least affected by the drop in household spending. However, our sector did experience a drop in sales of ready meals which are important users of thermoformed trays. There were also some moves from plastic to cardboard and a very small move from rigid packaging to flexible packaging with the intention of reducing the weight of packaging.

In previous years I have documented the changeover in the sandwich sector from initially PVC thermoformings to cardboard with PLA windows. At its height, sandwich packs used 10,000 tonnes of PVC and today I suspect it is less than 1000 tonnes made up of PVC and APET with the rest of the market being cardboard. Much of this has more to do with sandwich retailers wanting to appear to be green rather than actually lowering environmental impacts. It remains a big "lost market" with the UK spending something like £3 billion on sandwiches each year.

Easter eggs is another area where there has been a move from thermoformed units from time to time. This may not, however, have been a conscious move away from plastic but just a requirement to change marketing appeal. Thermoforming is still expanding into new packs as plastic is very versatile in achieving specific design criteria and probably the only way to incorporate several compartments in a pack such as yoghurt and jam snacks in separate sealed cavities.

Progress made in RPET (recycled content PET) is due to the pressure put on thermoformers by the retailers requesting packs with recyclate content as part of their "green marketing". There have also been significant developments in the recycling of PET bottles which today is the main material for leisure drinks.

The effectiveness and efficiency of the thermoformed unit in meeting the demands of the packaging chain from start to finish is the main reason why it is used extensively in all types of food packaging. But this makes the thermoformed unit "high visibility" in the shops and in the waste stream. Unfortunately, this means it also becomes an easy target for the environmentalists to attack as part of their efforts to reduce packaging as a whole. Science proves that this is somewhat misguided because of the numerous advantages our packs provide in the supply chain.

The thermoforming industry will continue, as always, to help the packaging industry reduce the weight of packaging materials through design and innovation in pack structure and materials development. There is no doubt that plastic materials can more easily be adopted in the move towards lower impact packaging than many other materials – importantly without affecting the integrity of the pack.

As ever, we need to constantly defend our products and at the same time be on our guard to make sure that irresponsible action by those seeking attention does not damage our industry. This is where PAFA, with your support, can continue the work it has already done with WRAP and DEFRA as the trusted voice of our industry.

During the year we continued to witness changes in the structure of our industry through mergers and some closures. This is likely to continue and we hope that the formation of very large thermoformers will help make the industry competitive abroad as well as at home. It gives our industry in the UK the stimulus to continue to meet the needs of the packaging industry through innovation and service, creating a vibrant and successful future for all.

Claude Shammas

High Attendance Reflects Regulatory Changes

TECHNICAL COMMITTEE REPORT

I have now chaired the Technical Committee for nine years and can report that the excellent attendance continues to average out at over 30 per meeting (which are held three times per year). This clearly demonstrates that the subjects discussed are of high relevance and great interest to PAFA member companies and there are no signs of this changing.

Each subject covered has at least one nominal expert who reports on activities that have affected, are affecting or will affect members. These subjects are Health & Safety (with a focus on the products we use e.g. solvents/adhesives), Bar Codes/RFID, Standards, Hygiene, Food Contact, REACH and the Environment.

I must make special mention of the contributions from Norman Chadwick, Derek Uttridge, John Bentham, Chris Whitehead, Paul Hunt, Roger Parry, Richard Armstrong and Tony Newbould as well as, of course, Martin Unwin and David Tyson for their enthusiasm and management.

2009 has seen increased activity in the area of standards and this subject will warrant further effort in 2010 as proposed standards for Good Manufacturing Practice in Packaging are debated as well as ongoing work on ease of opening of packaging, danger of suffocation from thin materials and biomaterials terminology. Technical Committee members receive a monthly update on Standards activity and comments are always welcome.

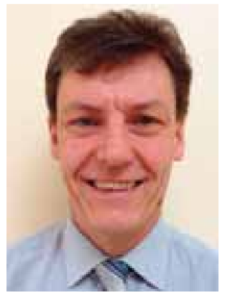
We are fortunate that John Bentham is also a member of the BRC/IOP Technical Advisory Committee and this allows members to express any concerns regarding hygiene audits via John.

Food contact is the topic that takes up more of the committee time than any other. Recent history such as the ITX issue clearly put more focus on inks whereas earlier activity had been on migration testing from plastics and isocyanate adhesives.

2010 is meeting its promise to be an active year with a new Plastics Implementation Measure (PIM), the Swiss Ordinance on Inks (from 1 April 2010), data gathering for Flavours, Additives, Food Contact Materials Exposure Task (FACET) as well as monitoring substances of concern such as BPA.

For our education on REACH we are indebted to the work of Tony Newbould. One of the meetings in 2009 was used to allow Tony the opportunity to give us a broader overview of the legislation and this meeting saw several new attendees attracted by the topic. I would anticipate the need for similar events in the years to come as the implications of REACH start to affect us all.

It is the need to be aware of the many and varying regulatory/compliance issues that ensures the success of this important committee and I would urge all members to have a regular attendee at the meetings in order to keep abreast of the changes taking place that affect us all, as well as presenting some excellent networking opportunities.



Robert Broughton

Confidence in being Competitive

FLEXIBLE PACKAGING GROUP

In spite of continuing consolidation in the sector, this grouping is still a very significant part of PAFA's activities. It comprises 18 companies operating on 24 sites in the UK with annual sales approaching £700 million and 3,500 employees.

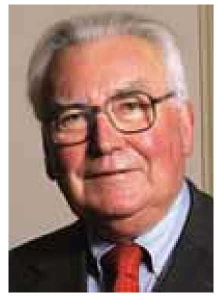
During the year two meetings were held and included the customary reports and briefings aimed at keeping members up to date with issues affecting their businesses. At the first meeting, in June, we also featured a comprehensive report by PCI Films Consulting on the global and European market for flexible packaging. The second meeting in December was held jointly with the PAFA Films Group and Thermoforming Group, reflecting the high degree of common interest we share. The CMAI report on supply trends in both polymers and films again provided a key feature of a very well attended event.

Perhaps surprisingly, and after a poor first quarter, overall demand has been stronger than we had expected at the close of 2008. Competition from converters in Northern Europe may have diminished but new challengers to our markets have appeared from further afield. Our members continue to show great resilience and adaptability in facing very tough trading conditions with every sign that trading conditions will be no easier throughout 2010.

Our quarterly financial survey has provided its contributors with a valuable benchmarking service for over 30 years. We now need to secure additional contributors from our membership to ensure that it can still provide a balanced and accurate picture of the sector's trading performance.

It is encouraging that members continue to show confidence in the industry's prospects and a resolve to remain competitive. At least four companies have made recent public announcements of major new investments in printing and laminating machinery and one moved into a new purpose-built factory during 2009.

I believe that we can also take encouragement from growing evidence that the messages that PAFA has consistently been broadcasting regarding the important contribution flexible packaging makes to society by virtue of its outstanding environmental credentials are at last being not only heard but also being better understood.



Martin Unwin

Accidents Reduced across PAFA Member Sites

PAFA member companies have continued to improve their safety with the lowest lost-time record since its nationwide annual survey began in 2003. The latest PAFA safety survey shows that members operating across 25 UK sites had just 34 RIDDOR (reportable injuries or dangerous occurrences) instances in 2009 - an overall 67% reduction in reportable accidents since 2003. The latest figures reveal that accidents of all types, including RIDDOR incidents, fell last year to just 53 recorded events compared with 142 accidents six years ago. In line with this dramatic improvement, the number of lost working hours in the sector fell by nearly 70% from 14,607 in 2003 to 4,826 last year – effectively halving the lost time per employee.

Announcing the improved results, PAFA CEO Barry Turner said, "Our industry uses many processes in converting polymer into packaging which have the potential, without adequate safeguards and training, to cause injury. For this reason, our members have pushed Health and Safety right up the agenda and we have also enlarged our Health and Safety Group which brings together experts from the member companies willing to share knowledge and experience. All of this has brought tangible results and the companies involved should be proud of their continuing record."

The emphasis on safety at work has remained an important focus in spite of the increased commercial pressures across the sector. The association also welcomed the positive support given by the Health and Safety Executive which has presented to a number of its meetings.

"It is good to see that, in spite of the global commercial pressures our industry faces, the area of health and safety is one which is not being compromised," concluded Barry Turner.

Membership Growth Reflects PAFA's Strengths

In recent times – and due in no small part to David Tyson's efforts as Chief Executive – the membership of PAFA has been rising year on year as businesses recognise the very real contribution which a single voice can make. This is in spite of the consolidation which is continuous across industry.

Many of the pressures and issues, economic and environmental, facing plastic packaging and film producers have to be dealt with at the highest level and this involves constantly meeting Government Departments and Ministers.

Without this level of representation, PAFA believes that regulation and legislation would have hit the industry even harder at a time when global factors have made UK manufacturing more difficult than ever. PAFA now has 71 full and associate members operating from 124 UK sites and also has 64 members in its CCA Scheme. If you are not a member already, see Benefits of Membership and How to Join on the back page.

Web Resource Keeps Members Informed

With less time on their hands and increasing pressure to get the latest information on issues affecting the industry, the PAFA web site www.pafa.org.uk has become a weapon of mass information for members. Over the last year or so the original web site which provided background to the association as well as copies of leaflets and press releases has undergone a continuing transformation to allow it to become more topical and relevant to members as the big issues affecting our industry develop.

And with more regulatory and legislative changes in the pipeline, material standards ever-changing and a raft of new environmental pressures emerging, the PAFA site has become a useful place for members to pick up the latest developments.

The home page has become the start point for key issues with short reminders of how members can participate in consultation or provide feedback. These lead into the Members Area where, after logging in, members can have their say by linking to consultative documents and the web sites of those in the UK and Europe responsible for regulatory change. The Members Area is also a good place to pick up minutes of recent meetings and the latest reports on quality standards.

Like all web sites, the information available is constantly changing and, because PAFA funds have to work hard in every direction, it is not possible to undertake major investment in the latest interactive technologies, animated graphics and video streaming. But the feedback to PAFA is that the site is now proving to be a great starting point for getting the latest from the association and, for those members who take up the offer of a free plug in the Members Links section, it can also prove to be a useful new business tool as well!

Driving better Understanding

PR AND COMMUNICATIONS REPORT

Although not a formal group within PAFA, the pr and communications function embraces all of the issues which members face on a daily basis. In the last year PAFA continued to communicate the strengths of our products on every front – in Government, the media, to our customers and the public. We also joined with Plastics Europe and BPF in sponsoring the 2020 Challenge - an industry-wide resource aimed at tackling head-on the issues which concern people about our products.

PAFA communications have always focused on the four R's – Reduce, Re-use, Recycle and Recover - but by promoting these together we can also benefit from the greater strengths that synergy offers. Our products are highly resource-efficient but we also have to prove that at every stage of good environmental management they are the best choice available.

The results are already coming through. They can be seen in the new 2020 website debates to which PAFA has made significant contributions in words and imagery. We have also worked to improve our own web communications by giving members more immediate access to the topical issues we face every day on their behalf. We have also played our part in widening our reach to organisations like the Marine Conservation Society, Wastewatch and others.

We also benefited from a more intensive dialogue with politicians and Government Departments so that everyone recognises our determination to make sure decisions are based on evidence not popular mythology.

And we have also played a major role in driving better understanding with our retail customers through a leading role in the retailer roadshows which have now been seen by most of the major supermarkets as well as Government organisations like BIS and the Environment Agency.

PAFA communications are as alive and alert as ever - and harnessing better, faster ways of communicating internally and externally. Thanks must go to our members for contributing to this work which is stimulating positive change in the perception of our industry. I would add my personal thanks for the outstanding support given by outgoing Chief Executive, David Tyson. No PR person could have wished for a better understanding of the demands placed by the need to communicate swiftly and positively. David also added great spirit and fortitude to our communication efforts on behalf of members.

Peter Woodall

SIMPL Approach will Pay Off

Recognising more than ever the need for good health and safety performance throughout the plastics industry, the sector's trade associations, the Health & Safety Executive (HSE) and other representatives from the industry have formed a strategy board to develop objectives appropriate to the needs and challenges of the industry as well as providing leadership to participating organisations.

'Safety in Manufacturing Plastics' (SIMPL) is the means by which the HSE is promoting the concept of 'Be part of the solution'. This dovetails with the plastics industry's initiative for health and safety and links with the principle that organisations attach the same priority to achievement of high standards of health and safety management as they would do to any other key aspects of business activities.

For PAFA members, this programme is a real opportunity for us to establish actual performance targets which will contribute to overall improvement and improve the overall image of the sector. It should also result in the risk premium for the sector being downgraded. Health and safety has changed over the years from one of prescriptive content to more proscriptive content through laws which continue to gather momentum. It recognises the need for safety measures to be risk based rather than rote based on broad legislative requirements. This adds to need for recognition and commitment by employers to the acceptability that risk assessments are the basis for safety measures.

We can do this through defined targets against which all parties drive change and improvement as well as measure performance. It is envisaged that these targets will be progressive from 2011 – 2014. These over time will reduce accidents, ill health, lost time as well as improve the industry's safety performance. PAFA members will be kept informed of progress.

European Influence

PAFA has a key part to play in monitoring and influencing regulatory developments at European level as they affect members. This is done in conjunction with European partners to ensure a consistent and well-informed industry influence. All European legislation and directives are framed with input from member countries and are subsequently interpreted and enacted in each country with local variations to make them relevant to each country's needs. A watching brief is therefore maintained at every stage of European legislation and its modifications when enacted in UK law. PAFA partners in this work include FPE , EUPF and EUPC.

PAFA also works with UK government departments at the critical point when new European legislation is being developed as well as, if required, directly with the European parliament.

Recent examples of our input include advice given on the definitions of packaging (where some member states were seeking revisions) and attendance at the European Parliament Breakfast where, together with our European partners, we took the opportunity to raise awareness of the economic importance of our industry and the challenges facing us at present.

In addition, a continuous stream of issues arising from technical standards, both ISO and CEN, are subject to our consultation on a regular basis. PAFA, through its Technical Group and its consultants, is constantly alert to ensure that international standards are framed with input and our members' interests at heart.

Members and Associates

PAFA MEMBERS

Alcan Packaging Europe
Alfaplas Ltd
Amcor Flexibles Europe
Arrow Flexible Packaging
ASP Packaging Ltd
Automated Packaging Systems
B & J Parr
Bemis Elsham Packaging Ltd
Brayford Plastics Ltd
Britton Group Ltd
Camvac Ltd
CeDo Ltd
Chiltern Thermoforming
Cromwell Polythene Ltd
Eurofilms Extrusion Ltd
Excelsior Technologies Ltd
F F P Packaging Solutions Ltd
Frank Mercer & Sons Ltd
Friths Flexible Packaging
Glopac Ltd
I G Industries Plc
Innovia Films Ltd
Marchant Manufacturing Co Ltd
Marpak Polythene Supplies Ltd
Mercury Packaging Ltd
Mondi Wheatley Packaging Ltd
Monro Ltd
Nottingham Flexo Ltd
Paragon FP
Parkside Flexibles
Plastic Products Ltd
Pregis Rigid Packaging Ltd
Printpack Ltd
Roberts Mart and Co Ltd
Sealed Air Corporation
Seevent Plastics Ltd
Sekisui Alveo Ltd
Signode UK
Simpac Ltd
Skymark Packaging Int Ltd
Sudpack UK Ltd
Supreme Plastics Ltd
Tech Folien Ltd
Tyler Packaging Ltd
Ultimate Packaging Ltd

PAFA ASSOCIATE MEMBERS

AkzoNobel Packaging Coatings Ltd
Ashland Plastics
Azelis Plastics
Battenfeld Gloucester Europe
Biesterfeld Petroplas Ltd
Borealis UK Ltd
Bostik Ltd
Carmel Olefins (UK) Ltd
Chase Plastics Ltd
Coim (UK) Ltd
Dow Chemical Co Ltd
European Packaging Distributors Ltd
Flint Ink (UK) Ltd
Hellyar Plastics
Henkel Loctite Adhesives
Interflex Scotland Ltd
LyondellBasell Industries
Mitsubishi Corporation UK Plc
Mitsui and Co UK Plc
Novelis UK Ltd
Rohm & Haas (UK) Ltd
SABIC UK Ltd
Sappi UK Sales Ltd
Solvay Polymers Ltd
Sun Chemical
Total Petrochemicals UK Ltd
Treofan UK Ltd

PACT ASSOCIATE MEMBERS SUPPORTERS

Borealis UK Ltd
Dow Chemical Company Ltd
LyondellBasell Industries
Sabic UK Ltd
Solvay Chemicals Ltd

Officers, Committees and Product Groups

MANAGEMENT COMMITTEE

Chairman	**D Read**	Printpack Ltd (Resigned August 2009)
	D Beeby	Innovia Films Ltd (Commenced October 2009)
Past Chairman	**B J Turner**	Britton Group Ltd
	I Bone*	Sudpack UK Ltd
	A J Chappell*	Mondi Packaging (Wheatley) Ltd
	C Fisher	Innovia Films Ltd (Resigned December 2009)
	P L Marchant*	Marchant Manufacturing Co Ltd (Resigned May 2009)
	D Moorcroft*	Excelsior Technologies Ltd
	B Nicholls	Amcor Flexibles Europe
	C J Shammas*	Plastic Products Ltd
	J E Wilson*	Sealed Air Corporation – Cryovac Europe
Chief Executive	**D M Tyson***	PAFA
Chief Executive Designate	**B J Turner**	PAFA (Commenced October 2009)
Director	**M Unwin**	PAFA
Committee Secretary	**P Bradburn**	(Resigned December 2009)

** Members of the Management Committee who are also Directors of The Packaging and Films Association Limited, a company limited by guarantee.*

COMMITTEES AND PRODUCT GROUPS

Management Committee
Technical Committee
Health and Safety Group
Human Resources Group
Statistics Panel
Flexible Packaging Group
Polymer Film Industry Liaison Group
Thermoforming and Rigid Films Group
Quality Assurance Scheme – Building Films
Carrier Bag Consortium
PAFA Consulting Group
Sustainability Group

Contact groups

RETAILERS

Non-PAFA Members include:

Alliance Boots plc
Asda Stores Ltd
British Retail Consortium
Budgens Stores Ltd
Cooperative Wholesale Society Ltd
Focus Ltd
Habitat UK Ltd
Harrods
Iceland Foods Ltd
INCPEN
Institute of Grocery Distribution
John Lewis Partnerships
Littlewoods Shop Direct Home Shopping Ltd
Marks and Spencer PLC
Packaging Federation
Rda Packaging Consultancy
J Sainsbury Supermarkets Ltd
Somerfield Stores Ltd
Superdrug Stores PLC
Tesco Stores Ltd
Waitrose Ltd
Wm Morrison Supermarkets PLC

FILM INDUSTRY CONTACT GROUP

Non-film producers include:

Akcros Chemicals
Arkema Ltd
Baerlocher UK Ltd
eChem Ltd
Erema
INEOS Ltd
Henkel Performance Chemicals
Hydro Polymers Ltd
LVM United Kingdom Ltd
Mitsui and Co UK Ltd
Rohm and Haas (UK) Ltd
Solvin Ltd
Vestolit Gmbh
Vinnolit Ltd
Witco Corporation UK Ltd

PACKER GROUP

Non-PAFA Members include:

Bernard Matthews Foods Ltd
Birds Eye Ltd
Booker Ltd
Brand Packaging Ltd
Cadbury Schweppes PLC
Coca-Cola and Schweppes Beverages Ltd
Du Pont Teijin Films
Eastman Chemicals
Fritolay Ltd
Food and Drink Federation
Gillette UK Ltd
H J Heinz
Imperial Tobacco Ltd
Johnson & Johnson Medical Ltd
Kimberley-Clark Europe
Masterfoods Europe
McCain Foods (GB) Ltd
Nestlé UK Ltd
Northern Foods PLC
Packaging Federation
Proctor and Gamble
Smith & Nephew
Tyco Healthcare
Unilever PLC
Weetabix Ltd

FILM/POLYMER INDUSTRY LIAISON GROUP

Non-film producers include:

Ashland Distribution
Azelis Plastics UK
Borealis UK Ltd
Carmel Olefins (UK) Ltd
Dow Chemical Products
Hellyar (UK) Ltd
LyondellBasell Industries
Mitsubishi Corporation
Petroplas Ltd
Sun Chemical
SABIC UK Ltd
Schulman (UK) Ltd
Total Petrochemicals UK Ltd
Whyte Chemicals Ltd

Affiliations

In promoting the interests of the plastics films industry, PAFA has affiliations or cross-memberships with the following organisations:

All Party Parliamentary Group (APPG)
Associate Parliamentary Sustainable Waste Group
British Chamber of Commerce and Industry (BCC)
British Coatings Federation (BCF)
British Plastics Federation (BPF)
Cleaning & Hygienic Suppliers' Association (CHSA)
Cogent – Polymer Sector Skills Council
Confederation of British Industry (CBI)
European Flexographic Technical Association (EFTA)
European Plasticised PVC Film Manufacturers' Association (EPFMA)
European Plastics Converters (EuPC)
European Plastic Films (EuPF)
European Rigid PVC Sheet Manufacturers' Association (ERPA)
Flexible Packaging Europe (FPE)
Health and Safety Executive (HSE)
Industry Council for Packaging and the Environment (INCPEN)
Institute of Grocery Distribution (IGD)
Institute of Materials (IOM)
Packaging Federation
PERA Group
Pira International (PIRA)
Plastics and Board Industries Federation (PBIF)
Polymer Machinery Manufacturers and Distributors Association (PMMDA)
RECOUP
Resource Recovery Forum
Society of British Printing Ink Manufacturers (SBPIM)
Trade Association Forum (TAF)
VALPAK
Valuplast

PAFA also maintains contacts with:

AEA Technology
Agricultural Development and Advisory Service (ADAS)
Association of British Healthcare Industries (ABHI)
British Board of Agrement (BBA)
British Coatings Federation
British Printing Industries Federation (BPIF)
British Retail Consortium (BRC)
British Standards Institution (BSI)
Business Environment Association (BEA)
Central Institute of Plastics Engineering and Technology (CIPET) India
Centre for Science and Environment (CSE) India
Chemical Industries' Association (CIA)
Combined Heat and Power Association (CHPA)
Comité Européen de Normalisation (CEN)
Department for Business, Innovation and Skills (BIS)
Department for Food and Rural Affairs (DEFRA)
Department of Energy and Climate Change (DECC)
Energy from Waste Association (EWA)
Environment Agency (EA)
Environmental Resources Management (ERM)
Environmental Services Association (ESA)
European Council of Vinyl Manufacturers (ECVM)
European Organisation for Packaging and the Environment (EUROPEN)
Federation Européen de l'Emballage Souple (FEDES)
Federation of Small Businesses
Flexible Packaging Association, USA
Food and Drink Federation (FDF)
Institute of Environmental Management
Institute of Grocery Distribution
Institute of Materials (IOM)
Institute of Wastes Management (IWM)
Institution of Environmental Sciences
International Life Sciences Institute (ILSI)
International Organisation for Standardisation (ISO)
International Solid Waste Association (ISWA)
Irish Business and Employers' Confederation (IBEC)
Local Authorities Co-ordinators of Regulatory Services (LACORS)
Local Authority Recycling Advisory Committee (LARAC)
Local Government Association (LGA)
London Assembly
Malaysian Plastics Manufacturers Association (MPMA)
National Centre for Business and Ecology (NCBE)
National Office of Animal Health (NOAH)
Packaging Council of Australia
Plastic Bag Association, USA
Plastics and Chemicals Industries' Association (PACIA) Australia
Plastics Europe
Plastics Federation of South Africa
RAPRA Technology Ltd
Scottish Executive
Society of the Plastics Industry of Canada (SPI)
Waste and Resources Action Programme (WRAP)
Welsh Assembly

Key Contacts

Registered Office

Packaging and Films Association
Gothic House
Barker Gate
Nottingham
NG1 1JU

Tel: 0115 959 8389
Fax: 0115 959 9326

E-mail: pafa@pafa.org.uk
Website:www.pafa.org.uk

Auditors

Nixon Mee Limited
Unit 9 Whitwick Business Centre
Stenson Road
Coalville
Leicestershire
LE67 4JP

Tel: 01530 276125
Fax: 01530 276126

Bankers

Barclays Bank PLC
Nottingham High Street Branch
Nottingham Group
Nottingham
NG1 6FF

Tel: 0115 980 6222
Fax: 0115 980 6245

Legal Advisers

Browne Jacobson
44 Castle Gate
Nottingham
NG1 6EA

Tel: 0115 950 0055
Fax: 0115 947 5246

Benefits of PAFA Membership

PAFA IS ITS MEMBERS

With a very small administrative team and low overheads in its central UK office, the vast bulk of the success of PAFA has been due to the commitment and energy of its members on whom it relies to create a platform for influence and a continuing achievement which is unmatched in the sector.

Access
PAFA members gain access to information, resources, intelligence, support and advisory services, all designed to give them an edge in a highly competitive trading environment. This access takes many forms, including the chance to participate in and influence debate on key issues which affect your industry; advance information made available as a result of PAFA's strong links with UK Government and regulatory bodies at home and abroad; the opportunity to see privileged industry intelligence on growth and trends which can help the strategic planning of your business and much more.

Advance Intelligence
PAFA commissions and gathers statistics and other information as well as participating in the process of regulation with Government Departments such as the DTI and DEFRA. It can help you understand anticipated changes and manage these to best commercial advantage.

Influence
It is impossible for a single business to hold influence over matters of regulation, legislation and political change. Yet politicians and senior civil servants will readily accept the need to inform and liaise with representative trade bodies. PAFA has been a respected part of the process for over fifty years and was described as a 'model trade association' by the Department of Trade and Industry. It is also a fully participating and greatly respected member of Europe-wide trade bodies with strong influence in Brussels as well as across the globe.

Networking
The chance to meet with like-minded people who understand the plastic films and flexible packaging business is a refreshing and exhilarating experience. This is often cited as a major benefit of membership. Whilst much of the business during meetings requires consideration and action upon serious issues which affect all our futures, this always takes place in a friendly and relaxed atmosphere in which new members are quickly welcomed.

Media Support
PAFA has enjoyed strong media support for many years and its communications resource supports the association and its members by constantly monitoring and managing media opportunities. Members receive regular updates on media interest and coverage as well as benefiting from the chance to influence the way customers and consumers view the industry. PAFA also produces a continuous stream of news information and authoritative features for the trade and professional media.

Lobbying
PAFA members benefit from long-established links with politicians, associated trade bodies and senior members of Government Departments in England, Scotland and Wales. The association also holds a strong influence with industry groups working at European regulatory levels. It has initiated many lobbying programmes over the years, particularly involving packaging and packaging waste regulation, chemicals regulation, climate change levies and environmental legislation aimed at discriminatory taxes such as those targeting carrier bags. In all cases its award-winning lobbying has resulted in major influence which has benefited member businesses.

Training & Education
PAFA is committed to improving the levels of skills training and education in the industry and was an active influence in setting up the new skills training council for the industry – COGENT. PAFA can advise on the best route to achieving the optimum training skills within your organisation based upon an intimate knowledge of the industry and its products and processes.

PAFA also works tirelessly to keep its members informed and represented at the highest levels in areas including:

Health & Safety
Quality Standards
Climate Change Rebates
Expert Advice
Testing Services
Regulation and Legislation
Industry Statistics

How to Join

Joining PAFA is simple but it could help your business get right to the heart of the industry, benefiting from information, intelligence and interaction with others.

Just make contact and we will give you all the information you need. Check out our web site first. If you need further reassurance, you can even attend a meeting of one of our specialist groups first to get a feel for the value your business can get from being part of the leading trade association for the plastic films, flexibles and thermoforming industry.

PAFA

Packaging and Films Association

Gothic House, Barker Gate, Nottingham NG1 1JU

Tel: 0115 959 8389 Fax: 0115 959 9326

E-mail: pafa@pafa.org.uk
Website:www.pafa.org.uk

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