EuPIA Annual Report

The European Printing Ink Association (EuPIA), working under the umbrella of CEPE, represents and protects the common interest of the European printing ink business and promotes the image of the industry in the public. It provides a forum for discussion and decision-making regarding issues of specific interest to the printing ink industry. EuPIA members also participate in CEPE working groups dealing with issues of general interest to the wider CEPE membership.

Market Information

The EuPIA Statistics Working Group (ESWG) succeeded in collecting – through a blind trustee – quarterly sales statistics of 25 companies in 27 countries in Western and Eastern Europe. It is estimated that this represents overall in excess of 90% of the total European market. Volume and value figures of sixteen ink and varnishes categories are collected and the compilation of them is distributed to the participating companies. Yearly aggregated figures are distributed to the national association for the EuPIA members not participating and for the use in communication with national authorities when necessary. They cover water borne liquid inks (includes inks, technological varnishes, extenders, primers and overprint varnishes), solvent borne liquid inks (includes flexo, gravure, publication gravure inks, technological varnishes, extenders, primers and overprint varnishes), oil based inks (includes coldset and heatset offset as well as conventional sheetfed offset inks) as well as all other inks and sundries.

The aggregated figures summarise value per country total, per category Europe and Europe total and the volume per category per country and for Europe total. The general overview is displayed on the EuPIA public website.

Printing Inks for Food Packaging

The printing ink industry is committed to contribute its share to the food packaging supply chain aimed at enhancing consumer safety. Last year’s activities of the relevant EuPIA Committee “Printing Inks for Food Packaging” focussed on further steps in establishing the Inventory List of Substances Used in the manufacture of Food Packaging Inks. Also, considerable effort was made to jointly finalize the studies into potential transfer of packaging ink constituents into food, together with the partners along the food packaging supply chain, organized in the Packaging Ink Joint Industry Task Force.

Inventory List of Substances Used in the Manufacture of Food Packaging Inks

In 2007, EuPIA had committed to publishing a list of raw materials and substances that are used in the manufacture of printing inks for food packaging. By this commitment, EuPIA acknowledged that customers, end users and the final consumers need to know as much as possible about the substances used in food packaging inks. EuPIA closely cooperates with the upstream supply chain to implement a transparent tool for packaging converters and brand owners that will in its final state include all data necessary to enhance consumer protection and product safety. Fig. 1 sets out details of the intended timeline for the public list to be completed. In April 2008, EuPIA published a yet incomplete version of a list of raw materials for food packaging inks on its public website (www.eupia.org), comprising four raw material groups: Additives, colourants, polymeric resins and solvents and energy curing monomers.

In the current version of the inventory, the list of additives is subdivided into chemical categories of substances and preparations used. Future versions will include more chemical details as they become available. To this end, the co-operation with the Food Contact Additive Sector (FCA) working under the umbrella of CEFIC, is currently focussed on the break back of raw material formulations into the ingredient substances, because it is only substances that can appear in the final inventory. FCA has established a system – (DOL – Database Online) – which is designed to assemble all the substances used in suppliers’ product formulations, whilst ensuring that confidentiality is safeguarded. Access to DOL is only granted to non-FCA members. The final completed inventory of substances is intended to form the starting point for a series of modules ensuring that food packaging is fully conform to the requirements of food contact materials legislation, as illustrated in Fig. 2. The modules basically consist of Good Manufacturing Practices to be employed at each stage of the packaging chain. This concept is a continuation of the prevailing “EuPIA Guideline on Printing Inks applied to the non-food contact surface of food packaging materials and articles” (version April 2008 accessible at www.eupia.org).

Parallel to these activities, the Swiss authorities have issued in 2007 a revision of the Ordinance on Materials and Articles in Contact with Food, which introduces new regulations on food packaging inks. The Ordinance came into force on 1 April 2008, with a transitional period of two years. One of the main aspects of the Ordinance is the positive listing of authorized substances. As a consequence, food packaging inks are only allowed to be manufactured using substances specified in these positive listings. Currently, these lists are outdated.
and incomplete, and many key raw materials are missing. The Swiss authorities have invited EuPIA to submit to the Federal Office of Public Health a complete list of substances used in the manufacture of packaging inks applied to the outer surface of food packaging.

The Packaging Ink Joint Industry Task Force – PIJITF

PIJITF encompasses all members of the food packaging chain, represented by their European trade associations.

- Food Packers: CIAA (European Confederation of the Food and Drink Industry)
- Packaging Manufacturers: ACE (The Alliance of Beverage Cartons and the Environment), CITPA (International Confederation of Paper and Board Converters), EAF (European Aluminium Foil Industry), EMPAC (European Metal Packaging), EuPC (European PlasticsConverters Confederation), FPE (Flexible Packaging Europe)
- Ink and Coating Manufacturers: EuPIA, CEPE Can Coating Sector Group

The Terms of Reference of the Task Force state that:

- The twin underlying goals of all involved in the chain are the production of safe, packaged food and the maintenance of high levels of consumer confidence in food safety
- The PIJITF has been formed with the aim of creating a model process for the transfer of information up and down the supply chain

The Terms of Reference include a planned method of operation and specifically propose developing a framework for the assessment and control of the risk of contamination of the food contact surface from the use of packaging inks. Over the past two years specialisation materials Working Groups of the PIJITF have conducted extensive studies into potential contamination as a result of migration from packaging inks. The study report was made available to the Food Contact Material Working Group of the European Commission/ DG SANCO; moreover the results were presented at the May 2008 meeting of this group, and very well received. Each of the working group reports contains detailed conclusions but an overall summary is reproduced here from the executive summary of the report:

Flexibles

The assessment of the subsequent analytical results demonstrated that none of the identified potential chemical migrants (i.e. chemicals known to be added to the ink formulations) printed on to the flexible packaging were found to migrate in concentrations higher than authorised levels (i.e. SML for evaluated substances and EuPIA Guideline levels for substances not currently evaluated by EFSA).

Metals

The means of substance transfer in the different printing process have been risk assessed, with the UV printing of flat sheet being considered the first priority for investigation as a result. Sector-wide and business-to-business analytical studies, initially concentrated on photoinitiators, have generally given no indication of risk to consumer health. Findings and good practices are being shared within the metals group and will feed into a ‘good practices’ protocol, the basis of which has already been drafted. The scope is being extended over time to UV monomers and conventional printing.

Paper and Board

The results demonstrate a low level of migration by set-off of some migrants in some applications. Overall these do not present any significant concern with regard to the safety of food being packed. Individual cases where more information is required will be followed up and where appropriate the programme will be continued with more representative samples. The methodology applied represents good practice for investigating the suitability...
of specific food contact applications and is indeed already applied in many specific circumstances.

**Further Activities**

The report is seen as completing the first and principal phase of the Task Force’s work. In addition to the results obtained and reported, an essential element of the work has been setting up the communication links along the supply chain. It is considered that it will be through the practical operation of these communication links that further phases of this work will, in the main, take place. Members of the Task Force through their trade associations are already committed to involvement in the FACET project and this project is seen as a very significant element in taking forward the work initiated by the Task Force. The longer term aim remains for the PIJTF to become a Reference Group, providing expertise along the supply chain and establishing contact with existing joint industry expert groups. Within this context there may also be the further opportunities for sharing of best practices with regard to analytical methods and other methodological aspects.

**Under Discussion: Carbon Footprint and Sustainability**

Carbon footprint is the latest buzz word in discussions about sustainability. The idea behind it is to provide a measure for the greenhouse gas emissions related to the whole lifecycle of a product or the activities of a company or an individual.

**Printing Inks and the Carbon Footprint**

EuPIA investigated to what extent the industry can provide information on the carbon footprint of printing inks. To date only data on ink production could be provided (based on the energy consumption during the production). An average estimate would conclude in 100 – 200 g CO₂ per kg of ink produced. Based on the studies of the UK based Carbon Trust on the carbon footprint of eg. a specific crisps package a further estimate determines the ink contribution to be in the order of one percent, which for the time being would be an assumption to be generalized also for other applications. Although of little relevance in the context of the global emissions the ink industry will stay committed and is further investigating into more accurate data.

**A responsible industry with sustainable products**

The printing ink industry is fully aware of its responsibilities and recognises the need for reducing the impact on the environment. The industry lives up to its responsibilities in many ways. For example, it has a proven track record of using considerable amounts of renewable raw materials. The industry has established an exclusion list for raw materials. Energy resources are used efficiently in the manufacturing of inks. There is an industry commitment to support deinking and thus paper recycling. EuPIA will closely follow further developments concerning the carbon foot-

print and sustainability in general. It will continue to contribute to a discussion based on facts and cooperate with stakeholders along the supply chain.

**Occupational Safety and Risk Assessment (OSRA)**

OSRA objectives are to support member companies of EuPIA and other sectors of CEPE, in particular SMEs, and customers/printers/applicators to operate at the highest possible level of plant and occupational safety. Guidance established by OSRA includes conformity with any European or relevant national guidelines.

The group operates by

- **Sharing information and experience** following the principle of transparency in plant safety, occupational safety, occupational medicine and incidents between all companies, which is an essential activity to improve health and safety at the workplace inside and outside the printing ink industry.

- **Assessing the risks** resulting from the use of hazardous substances.

- **Considering commitment** to Responsible Care®/Coatings Care® and Product Stewardship.

- **Incident reporting** by all EuPIA members in a standardised fashion.

- **Benchmarking HSE performances** in a standardised fashion.

To help members in developing risk reduction strategies, OSRA currently drafts guidelines for ink and coatings manufacturers and for printers or industrial coating applicators that could be of three types:

- **Alerts** (circulated in the group, and published thereafter). To date, 14 alerts dealing with chemicals (solvents, nitrocellulose) of handling (e.g. forklifts) have been published.

- **Safety guidelines for ink/coating manufacturers** restricted for use by EuPIA/CEPE members. Guidelines on the safe handling of solvents and of nitrocellulose in manufacturing have been published and updated. One guideline on the safe handling of powder material is under preparation.

These documents are available on the EuPIA extranet (members area of www.eupia.org).

- **General guidelines for customers/users** (printers, coaters). There are the Guideline for the safe handling of flammable liquids and the Guidelines for the Safe Use of Cellulose Nitrate Printing Inks and
Related Products. The Guidelines for Printers on the Safe Use of Energy Curing Printing Inks and Related Products is under revision. These are available on the CEPE and EuPIA public website.

5th EuPIA Annual Conference

Record participation in Prague on February 28 & 29 2008

The EuPIA Annual Conference showed a record participation of more than 70 attendees from 26 companies and organisations. An intense and interesting programme attracted many executives from the ink industry across Europe. The attendance of many small and medium-sized enterprises underlined the importance of EuPIA as the key spokesperson for the printing ink industry. Market trends, regulatory affairs, the competitiveness of the European printing and printing ink business, and the challenges and opportunities in emerging markets were the major topics of the summit.

Felipe Mellado, the leaving Chairman of EuPIA, opened Day 1 and summarized the year 2007 in retrospect. The keynote was followed by Chris Whitehead, Chairman of EuPIA PIFOOD, who informed about the latest developments in printing inks for food packaging. Thomas Parker from Interel in Brussels explained the concept of a crisis management system for EuPIA. A panel discussion with the speakers concluded the first part of the afternoon.

After a break, Jörg-Peter Langhammer, Chairman of the EuPIA Technical Committee, put the sustainability for the ink industry into perspective. He was followed by Marco Boer from IT Strategies who gave interesting insights into digital printing and effects on the traditional industrial print. A second panel discussion closed the official programme of the first day.

Accompanying the official programme, the hosting company, Huber Group, had organised a superb reception and evening programme at Bellevue close to the Charles Bridge. On this occasion, Felipe Mellado was honoured by Herbert Forker, his successor as Chairman of EuPIA, for his outstanding achievements during his two years of EuPIA presidency from 2005 to 2007.

Dirk Aulbert, EuPIA’s newly elected Vice Chairman, opened Day 2. Martin Cellerier, Chairman of the EuPIA Statistics Working Group, presented market information about the European ink market – facts, trends and other analyses of our industry. Beatrice Klose, Secretary General of INTERGRAF, the International Confederation for Printing and Allied Industries, gave a presentation focusing on the competitiveness of the European printing industry and the influence of China. The Managing Director of Marabu, Ralph Roschlau, revealed interesting learnings of unfair competition from outside Europe and the consequences for a medium-sized enterprise. Vladimir Hranicka represented the host country. He reported about the developments of the Czech Polygraphic Industry over the last five years. Thomas Rainer, CEO of Berndt & Partner Packaging Consultants, spoke about the future trends and challenges for the European packaging and packaging ink industry. The last presenter was Hanno Bastlein, CEO of Constantia Packaging, who gave a lecture on the business prospects for the emerging packaging markets in Eastern Europe. Again, a panel discussion with all speakers and a conclusion note of Herbert Forker closed the conference day.

The EuPIA Council and member companies felt the Prague meeting was a great success. The combination of top-level keynote presentations, highly relevant industry information and ample networking opportunities made from those two days a “mandatory event” for decision-makers in the ink industry.

Announcement of the 6th EuPIA Annual Conference in 2009

The next Annual Conference will be on 5/6 March 2009 in Berlin, Germany. More details to follow.