



Tinplate Group

Roadmapping Meeting

October 2007

Summary Document



Overview

The Tinplate Group is coordinated by Tin Technology. Many of the major industry players in the global tinplate industry and its supply chain are members of the group.

This meeting was hosted by Corus Packaging Plus at its IJmuiden site in the Netherlands on 4th October 2007. The 31 delegates, listed below, included tinplate producers, canmakers, electrolyte suppliers, lacquer suppliers and others from Europe, the US, Argentina, India, South Korea and Australia.

Its purpose was to bring the industry together to discuss global legislative and technological drivers and how these are likely to affect technology needs over the next decade. The output will form a platform for potential future collaborative actions within the group, in association with other industry and research bodies.

The 1-day meeting began by brainstorming in breakout groups in relation to technological and legislative factors over the next 10 years. These data were then compiled into 14 provisional Challenges. In the afternoon sessions these were prioritised and priority Challenges were further defined, with actions proposed.

Results from the meeting were edited and used to produce a Tinplate Group Roadmap.

Subsequent to the meeting, a Tin Technology steering committee and the chairman of the Tinplate Group met in November 2007 to plan the next steps.

The documentation from the meeting issued to the Tinplate Group membership will form the basis for a consultation exercise, coordinated by Tin Technology, for review at the end of December 2007. Members will be asked to circulate the papers within their organisations to decision-makers and experts within the various topics. A Feedback Form will be used to gather responses, gauging support for the proposed topics, including expressions of interest in coordinating and/or participating in expert working groups. Working groups will review state-of-the-art for the particular topic in more detail and develop proposals for further collaborative action.

Progress will be reported, proposals presented and further actions taken at the next Tinplate Group meeting planned for Tuesday 22nd April 2008 in Dusseldorf, linked to the MetPack exhibition in Essen, Germany.

Tinplate Group Roadmapping Meeting Delegates

Delegate	Company	Position	Country
John Collingham	Corus Packaging Plus	Product & Market Development Manager	Netherlands
Mark Gantley	Corus Packaging Plus	Strategy Manager	Netherlands
Wim Van Der Meer	Corus Packaging Plus	PMD & Strategy Director	Netherlands
Armin Von Keitz	Corus Packaging Plus	Environmental Manager	Netherlands
Luc Nueville	Arcelor-Mittal Europe	VP Strategy & External Affairs	France
Richard Clausius	Arcelor-Mittal USA	Staff Research Engineer	US
Ashok Ghosh	Tata Iron & Steel	General Manager (Operations)	India
Joong Geol Ahn	TCC Steel	R&D Team Manager	South Korea
Roman Gburik	US Steel Kosice	Research Engineer, Tin Mill Products	Slovakia
Gonzalo Benitez	Siderar Argentina	Researcher	Argentina
Alain Le Talludec	Impress Metal Packaging	R&D Engineer	France
Chris Bell	Visy Industries	Metals & Coatings Development Manager	Australia
Joerg Pfuetzner	IPA	Manager Technical Office	Germany
Ray Good	ICI Packaging Coatings	Technical Consultant	UK
Peter Mayr	Valspar	Technical Director	Austria
George Federman	Technic	Vice President, Process Development	US
Paul CP Van Ham	Rohm & Haas	Sales Manager	Netherlands
Steve Nettleton	Clariant	Business Manager	UK
Jacko Pijper	Magneto Anodes	Sales Engineer	Netherlands
Jan Claessens	(Steinert Rep.) Bulk ID	CEO	Belgium
Wietse Van Der Meer	Friesland Coberco	Packaging Technologist	Netherlands
David Filkins	Kemeny Overseas	President	US
Jeremy Pearce	Tin Technology	Technology Information & Forecasting	UK
Tony Wallace	Tin Technology	Senior Information Analyst	UK
Charlie Kerr	Tin Technology	Research Manager, Coatings	UK

Roadmapping Process

Step 1: Brainstorming

In the morning session, 4 pre-defined breakout groups, with nominated Facilitators, used Post-It notes and flipcharts to brainstorm on the question:

What are the technological and legislative factors impacting upon our industry over the coming ten years?

In each group the raw data on Post-It notes were collated into logical topic areas.

Each group then reported back to the main meeting, with further discussion.

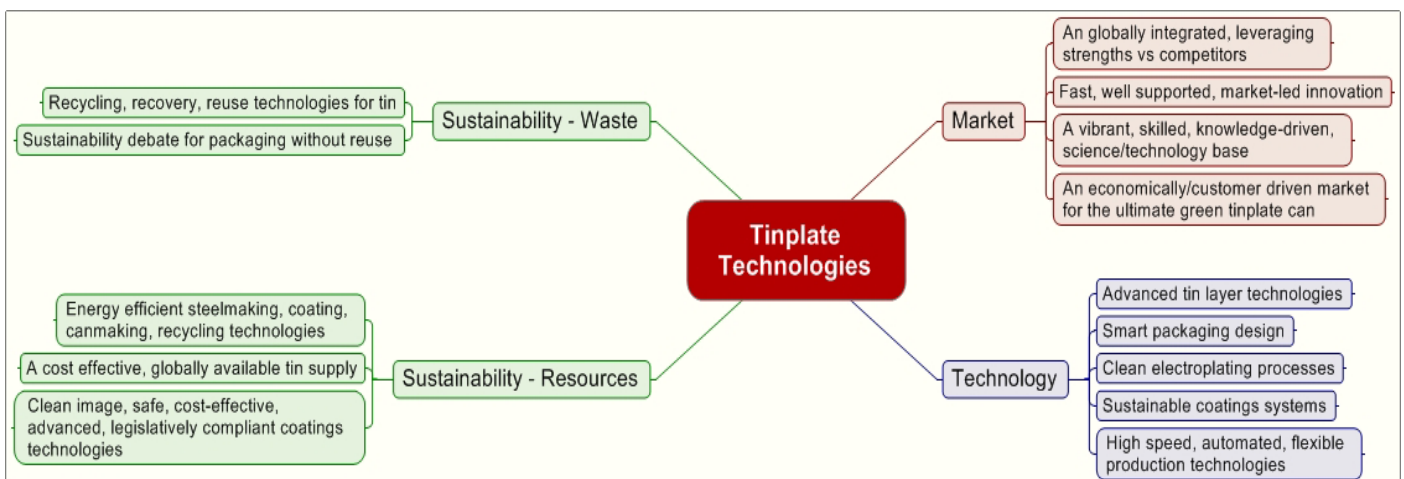
Step 2: Deduction of Provisional Challenges

During the lunch break the data was further refined by the Tinplate Group management team, based on the emerging consensus from each group. 4 topic areas were deduced.

- Market
- Sustainability–Waste
- Sustainability–Resources
- Technology

In each area, the several topics identified were represented as provisional Grand Challenges – vision statements of the objective to be achieved in the next 10 years.

14 Grand Challenges were deduced, as shown below and in Annex II:



Step 3: Roadmapping Priority Challenges

In the afternoon session, the delegates were invited to join 4 new breakout groups, based on each of the 4 topic areas, by self-selection. Each group had a nominated Facilitator.

The participants were instructed to choose 2 priority Challenges. Then, for each priority Challenge, they were asked to:

- Further define the issue
- Share knowledge on status of the issue
- Propose actions to address the Challenge, including modality, timescales etc

Step 4: Tinline Group Roadmap

Following the meeting, the results were reviewed, edited and presented by the Tinline Group management team.

In this process, 3 provisional Challenges relating to sustainability of coatings were merged, as were 2 related to market drivers and 1-way packaging, leaving 11 Challenges.

7 Challenges had been provisionally identified as Priority areas by the delegates.

The 2 Sustainability-related topic areas were merged, giving 3 final topic areas:

- Market
- Sustainability
- Technology

Each Challenge was numbered and given a short title for future ease of reference.

Some rearrangement of the Challenges was made: Market Drivers was moved to 'Sustainability' and Knowledge to 'Technology'

Finally, the Challenges were categorised as Short Term, Medium Term and Long Term.

The resulting matrix is shown as Grand Challenges below.

This was combined with data from the Post-It notes, as well as notes taken from open discussions at the meeting, and a Roadmap produced.

Tinplate Group Roadmap - Grand Challenges

MARKET			SUSTAINABILITY			TECHNOLOGY			
SHORT TERM	1. GLOBAL INTEGRATION	A globally integrated tinplate industry, leveraging the strengths of tinplate packaging versus competitors	✓	3. MARKET DRIVERS	A market-driven preference for the ultimate sustainable tinplate can	✓	8. KNOWLEDGE	A vibrant, skilled, knowledge-driven, science and technology base	✓
MEDIUM TERM	2. INNOVATION	Fast, well-supported, market-led innovation		4. LOW ENERGY TECHNOLOGIES	Energy efficient steelmaking, coating, can making and recycling technologies	✓	9. FAST PRODUCTION	High speed, automated, flexible production technologies	
				5. CLEAN TECHNOLOGIES	Clean, safe, cost-effective, advanced, legislatively compliant coatings technologies	✓	10. SMART PACKAGING	Customer-interactive tinplate cans, using smart technologies to deliver high quality contents with high impact branding	
				6. TIN RECOVERY	Implementation of tin recycling, recovery, reuse technologies	✓			
LONG TERM				7. TIN SUPPLY	A cost effective, globally available, long-term tin supply		11. ADVANCED TIN COATINGS	Advanced tin coatings that are thinner, more reaction resistant, uniform, more efficiently deposited, with controlled detinning and highly drawable	✓

✓ = Provisional priority

Tinplate Group Contacts

The Tinplate Group is coordinated by Tin Technology, a research organisation linked to the world's tin producers via [ITRI](#). It is currently chaired by John Collingham, Corus Packaging Plus, IJmuiden, The Netherlands.

For more information, including more detailed results from the meeting and how to join the Tinplate Group's activities please contact:

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