

European Coatings

Executive Summit

International Strategy Day
for Coatings Executives
and Senior Management

Meet the Experts on

- *Strategic Mega Trends*
- *The Future of the Coatings Industry*
- *Focussing on the Customer*
- *Securing Growth*

Nuremberg/Germany
2nd April 2001 preceding the

**EUROPEAN
COATINGS
SHOW@01**



The Summit at a Glance

Nuremberg 2001 will host a world premiere: for the first time ever, international executives and senior management from small, medium-sized and large coatings companies will convene to discuss – and shape – the industry's future. During an intense day of presentations, panels, small-group sessions and individual follow-ups, accomplished coatings luminaries will share their vision, offer high-level analyses and provide insight into new opportunities. Interactive features and get-together forums will facilitate an effective exchange of ideas and meeting of minds. Discussion and audience input is strongly encouraged; attendees will also appreciate the chance to mix and mingle with peers from all over Europe – especially, but not only during the Summit: the EUROPEAN COATINGS SHOW kicks off on the following day.

European Coatings
Executive Summit: *See the Future.
Join the Network.*

1st April 2001

20.00 h „Network Night“

2nd April 2001

9.00 – 10.30 h

Plenary Session „Strategic Mega Trends“
Part I: Big Business, by Alphabet

Dr. Rinus Rooseboom, Akzo Nobel
Klaus Peter Löbke, BASF Coatings
John R. Lewis, DuPont Performance Coatings

10.30 – 11.00 h *Coffee Break*

11.00 – 12.00 h

Plenary Session „Strategic Mega Trends“
Part II: Medium-Sized and Associated

Dr. Andrea Moltrasio, ICRO Coatings
Neville D. Petersen, CEPE

12.00 – 13.00 h

Panel Discussion

„The Future of the Coatings Industry“

Moderators:

Jürgen Nowak, Vincentz Verlag
Louis McCulloch, The Coatings Agenda

13.00 – 14.00 h *Lunch Break*

14.00 – 15.00 h

Target Session I:

„Focussing on the Customer“

Ian Harrison, Orr & Boss
Ola Ahlstrand, IKEA of Sweden

14.00 – 15.00 h

Target Session II:

„Securing Growth“

Detlev Sassenberg, 3H-LACKE
Jacob Emmelkamp, Nelf Lakfabrieken

15.00 – 15.30 h *Coffee Break*

15.30 – 16.30 h *Speaker Tables*

16.30 – 17.30 h *Farewell Cocktail*

Summit

Strategic Mega Trends – Big Business, by Alphabet

Strategic Mega Trends – Big Business, by Alphabet

2nd April 2001 · 9.00 h – 10.30 h



*Klaus Peter Löbbe
President Coatings
Division,
Chairman of the
Board of Executive
Directors,
BASF Coatings AG*

*„More shareholder value is
what we have to strive for“*

Mr. Löbbe anchors his presentation on the premise that value-increasing growth in coatings companies has to support and create shareholder value. Thus, establishing and enforcing this defined type of growth becomes paramount. Two approaches can be tackled: improving profitability of current businesses versus identifying and exploiting growth opportunities. The heart of the matter then, to be discussed in detail at the Summit, are the prerequisites for implementing value growth.

Klaus Peter Löbbe, who has held posts in Europe and Japan, is concerned about the image of the coatings industry.



*John R. Lewis
Vice President &
General Manager,
DuPont Performance
Coatings*

*„Separating facts from feelings
while honouring experience is
a key component of successful
integration“*

Consolidation of customers within key global markets has and will continue to drive alliances, mergers and acquisitions across the industry. In response, coatings manufacturers must find either profitable niches or align to increase their economies of scale so that they can afford to reinvest and still satisfy both their customers and stakeholders.

Mr. Lewis will comment on the process of setting new financial targets, the process of breaking down integration opportunities in separate teams followed by a single team and the will it takes to address synergies.

John R. Lewis, with an American background and European experience, has a special interest in the automotive industry („that is my community“).



*Dr. Rinus
Rooseboom
Senior Group
Director Coatings,
Akzo Nobel BV*

*„The coatings industry is
no exception to the rule“*

E-developments have had and will continue to have a very major impact on the economy. In this context, it is vital to realise the simple fact of life that the coatings industry is not a fundamentally different kind of business. Thus, coatings manufacturers will also have to differentiate themselves and/or focus on cost leadership and scale. Mr. Rooseboom will elaborate on this, placing emphasis on how exactly coatings companies can turn a possible threat into an asset.

Dr. Rinus Rooseboom has recently put E-developments on the top of his agenda.

Strategic Mega Trends Strategic Mega Trends Medium-Sized and Associated Medium-Sized and Associated

2nd April 2001 · 11.00 h – 12.00 h



*Dr. Andrea Moltrasio
Member of the Board,
ICRO Coatings S.p.A.*

„Strategic alliances – instead of acquisitions – can be just right for SMEs“

In the face of ever greater consolidation of the coatings industry, virtually every company looks at acquisitions and mergers. While this strategy promises great benefits for many players, others might want to look further, finding viable alternatives – either as a preparatory step or as means in itself. Strategic alliances, possibly with a strong regional flavour, should be examined. Dr. Moltrasio will do just that, discussing challenges, solutions and patterns. Case histories will also be featured.

Dr. Andrea Moltrasio draws from his two-fold experience as both company executive and national coatings association manager.



*Neville D. Petersen
President, CEPE*

„The industry will have to point out the real value of its products“

The market situation of the coatings industry is changing continuously and the future is less predictable than it once was. We just cannot foresee today what competencies will be required for a certain job in ten years time. Manufacturers will have to be extremely flexible to adapt quickly to new demands. However, innovation will not always focus on technical aspects; marketing strategies play an increasingly important role. Better paints and inks help our customers save costs – this has to be emphasised much stronger.

Neville D. Petersen has a vision of the deco industry to become a „fashion business“, while industrial coatings manufacturers develop into full-blown solution providers.

Networking Opportunities



Maximum interaction is ensured by numerous features revolving around the high-class presentations:

Network Night

Who's who: on the evening of April 1st, starting 20.00 h, delegates and speakers join for an informal, introductory get-together, right at the Le Méridien Grand Hotel.

Panel Discussion

„The Future of the Coatings Industry“ Wrapping up the morning sessions, the Plenary Speakers, prompted by the audience and the moderators, will try to paint a picture of what is in store for the industry.

Speaker Tables

Delegates will sit down with the speakers in small groups for a face-to-face exchange and „hands-on“ discussion.

Q&A

Delegates are, of course, encouraged to put forward questions, offer comments and share their own views with the audience.

Farewell Cocktails

Informal setting to socialise with new Summit peers before departure – or liaise for the evening prior to the EUROPEAN COATINGS SHOW.

Focussing on the Costumer Focussing on the Costumer

2nd April 2001 · 14.00 h – 15.00 h

Ian Harrison
Managing Director,
Orr & Boss



„Strong technology and low production costs are insufficient to generate competitive advantage“

Mr. Harrison will bring five key messages to Nuremberg: concentrate on profitability – the bottom line, not the top line. Ensure staff understand why acceptable profitability is essential. Focus on the market. Remove excess capacity. Recognise that strengths are imaginary unless matched to genuine market opportunities. These messages will be put into the context of slow growth, the need to focus on core markets, globalisation as well as consolidation in the industry and its channels of distribution.

Ian Harrison has worked closely with the senior management teams of both European and US coatings companies.



Ola Ahlstrand
Manager Surface
Coverings,
IKEA of Sweden AB

„Our assessment of new suppliers includes a judgement of their view of environmental matters“

The image and, ultimately, the success of a coatings manufacturer depends largely on the fulfillment of customer and consumer expectations. Just complying with regulations is far from enough. Companies might wish to cooperate quite closely with their customers, possibly in ways different from the past. A constantly high level of quality is the beginning, not the end of this process. IKEA would ask potential coatings suppliers, if they have an environmental policy, if they can vouch for environmental know-how.

Ola Ahlstrand is an outspoken analyst of the relationship between coatings customers and suppliers.

Summit

Securing Growth Securing Growth

2nd April 2001 · 14.00 h – 15.00 h



Detlev Sassenberg
Marketing Manager,
3H-LACKE,
Lackfabrik Hammen
GmbH & Co.

„Coatings SME: I would translate that as Speed, Mobility, Enthusiasm“

What is it that makes SMEs find their way to success in a market whose requirements change fast? How do they manage, given the growing globalisation of the industry? It is their speed, their flexible reaction in the face of change. It is their intelligence and enthusiasm, channelled into innovation and customer service.

Detlev Sassenberg, whose portfolio of responsibilities includes „New Markets“, has had significant business development success in Europe and overseas.



Jacob Emmelkamp
Owner and
Managing Director,
Nelf Lakfabrieken BV

„To be or not to be“

Mr. Emmelkamp will raise a fundamental question: how to survive as an independent player in the global paint market – and he will point out strategies which have proved successful. Thus, he will tackle focussed expansion into foreign markets such as Poland and Estonia – after identifying appropriate niche sectors; private labelling; highly selective small-scale acquisitions; and information input management from sources such as national and international associations.

Jacob Emmelkamp has earned his company by a management buy-out; he is also a member of the board of the Dutch Paint Association and deputy for CEPE.



In less than a decade, the EUROPEAN COATINGS SHOW has become the industry's most prestigious event. Every two years, the pulse of the European coatings industry beats at Nuremberg! Figures from the last event in 1999 – 569 exhibitors and over 10 600 professional visitors – underscore its undisputed success.

Summit attendees will be offered an exclusive direct shuttle service from the hotel to the European Coatings Show on 3rd April 2001 and entitled to a VIP Ticket on all three days of the Show.

EUROPEAN COATINGS SHOW 2001

*Where the
Coatings
Industry
Meets!*



General Information

Organiser

Vincentz Verlag · Schiffgraben 43
30175 Hannover · Germany
Tel. +49 (0)511-9910-273
Fax +49 (0)511-9910-279
eMail: pennartz@coatings.de
http://www.coatings.de/

Venue

Le Méridien Grand Hotel
Bahnhofstr. 1 – 3
90402 Nuremberg
Germany
Tel. +49 (0)911-232-2609
Fax +49 (0)911-232-2667
eMail: lemeridien@grand-hotel.de
http://www.grand-hotel.de

Summit Fee

The Summit fee amounts to € 990 including 16 % German VAT which must be paid by all attendees from any country. In some cases, the VAT is refundable for non-EU citizens.

The fee includes

- Summit proceedings
- List of delegates
- Lunch & coffee breaks
- Participation Network Night on 1st April 2001
- Shuttle bus service to the European Coatings Show on 3rd April 2001
- Free entry to the exhibition on 3rd – 5th April 2001
- Exhibition catalogue

Summit Language

The entire Summit will be held in English language only, simultaneous translation will not be provided.

Accommodation

Hotel accommodation is not included in the Summit fee. Attendees can make their hotel reservation directly at the Le Méridien Grand Hotel at a special rate of

- DM 199 for 1st April 2001
 - DM 345 for 2nd April 2001 (exhibition surcharge)
- including VAT and breakfast.

Early hotel reservation is essential (2 months in advance) due to the high demand of hotel rooms during exhibition times. Please refer to „Summit“ when making your reservation.

Cancellations

The fee will be refunded in full if the cancellation is received by 5th March 2001. 50 % of the Summit fee will be refunded in case the cancellation is received later, but not later than 19th March 2001. In all cases postmark date shall apply. Delegates who cancel after 19th March 2001 or fail to attend without notifying the organiser will be liable for the whole Summit fee. Substitutions of delegates may be made at any time. Cancellations and changes should be notified in writing and will be confirmed by the organiser. Any fees to be refunded will be paid after the end of the Summit.

Please note

that photographs of attendees will be taken during the Summit and may be used for promotional purposes. The address data is processed for customer service and information purposes in compliance with the German Federal Data Protection Law.

Travelling to Nuremberg

The Le Méridien Grand Hotel is easily accessible while enjoying a central location in the beautiful city of Nuremberg, directly at the entrance to the historical Old City. In the immediate vicinity, one can find the main train station, and it is only about 8 km to the exhibition centre and the airport. All tourist sights and well-known shopping streets are in walking distance.

→ By plane

There are non-stop flights to Nuremberg airport from most important European capitals. The airport is close to the city and conveniently connected with the

Your Key Contact Numbers

Information & Registration

Anette Pennartz, Events Division

Tel. +49 (0)511-9910-273

Fax +49 (0)511-9910-279

eMail: pennartz@coatings.de

Hotel Reservation

Le Méridien Grand Hotel

Reference „Summit“

Tel. +49 (0)911-232-2609

Fax +49 (0)911-232-2667

main train station („Hauptbahnhof“) by underground line U2. However, please note that unless you are travelling to Nuremberg without changing airplanes, there are excellent train connections from Frankfurt international airport that might save you a lot of time and possibly some inconveniences: travel time Frankfurt – Nuremberg: only 2 hours!

→ By train

Nuremberg is a traffic junction in the European railway system. Use the Eurocity (EC), Intercity (IC) or InterCityExpress (ICE) for an eco-friendly and relaxing journey to Nuremberg's main train station.

→ By car

Nuremberg is centrally located on the Southern German and Central European motorway network. Direct feeder roads from the motorways provide rapid access to the city centre, just follow the street signs „Zentrum“ leading you to the main train station („Hauptbahnhof“). A covered public car park is situated opposite the hotel.

subject to change

Summit Registration Form

Summit Registration Form

Please print!



Title	First Name	Name
Company		
Street		
Zip Code/City	Country	
Phone	Fax	
eMail		

Summit fee per delegate:
€ 990 incl. 16 % German VAT

Fee also includes (please check whether delegate will attend):

→ Participation "Network Night"
1st April 2001, 20.00 h
 Yes No

→ Shuttle Bus Service to ECS
3rd April 2001
 Yes No

Payment

Please choose one of the following methods of payment. We will send a confirmation of participation and invoice by return. Please note that the amounts indicated below are VAT inclusive.

- Please send an invoice for € 990.
- Please charge my credit card for € 990:
 - Mastercard Eurocard Visa
 - American Express Diners Club

Card No.

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Expiry Date _____ / _____

Cardholder's Name

Cardholder's First Name

Cardholder's Address (if different from company address)

Street

Zip Code, City

Country

Date, Signature

Please return to

Vincentz Verlag
Anette Pennartz
Events Division
Schiffgraben 43
30175 Hannover
GERMANY

or via fax +49 (0)511-9910-279