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WITH 16 EDITIONS  
IN EUROPE AND ASIA PACIFIC,  
THE OUTLOOK™  
CONFERENCES HAVE  
ATTRACTED OVER  
4,000 PARTICIPANTS  
FROM ACROSS THE GLOBE

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# OUTLOOK™ 2015 LATIN AMERICA PLUS

## THE WORLD'S PREMIER **NONWOVEN PERSONAL CARE PRODUCTS CONFERENCE**

3<sup>rd</sup> – 5<sup>th</sup> March 2015

SAO PAULO | BRAZIL  
RENAISSANCE SAO PAULO HOTEL

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**EDANA and INDA welcome you  
to the Latin American event of the year,  
together with senior executives  
and suppliers from across the nonwovens  
industry.**

**Held for the first time in Latin America,  
OUTLOOK™ Plus is a three-day  
conference and exhibition covering  
market, product, and technology  
intelligence for hygiene, personal care,  
and durable nonwoven applications.**

OUTLOOK™ Plus Latin America is co-organised by both  
INDA and EDANA, with support from ABINT, the Brazilian  
Technical Textiles and Nonwovens Association.

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CO-ORGANISED BY BOTH **EDANA** AND **INDA**



**Association of the  
Nonwoven Fabrics Industry**  
ADVANCING NONWOVENS WORLDWIDE®

[www.edana.org](http://www.edana.org)  
[www.inda.org](http://www.inda.org)



## Tuesday 3<sup>rd</sup> March 2015

08.30 > 17.30

### Conference Registration at the Renaissance Sao Paulo Hotel

Please wear your badge at all times for easier networking

08.30 > 09.15

WELCOME COFFEE AND OPENING OF THE TABLETOP AREA

09.15 > 09.30

Welcome and Introduction to the Event by its Organisers



#### MODERATOR

**Patricia Featherstone**, Director Marketing & Communications,  
RKW Hygiene & Industrial Division, (Belgium) & Chair of EDANA Board of Governors

09.30 > 10.30

### OUTLOOK OF THE BRAZILIAN ECONOMY, LOCAL NONWOVEN MARKETS AND NEIGHBOURING COUNTRIES



#### KEYNOTE

**Roberto Macedo**, PhD, Consultant in Economics (Brazil)

10.30 > 11.00

### NONWOVENS INDUSTRY CHALLENGES IN SOUTH AMERICA: RELEVANT EMERGENT REGION IN GLOBAL PERSPECTIVE



- Economic outlook at a glance in the main South American countries
- Challenges for the nonwoven industry
- Regional approach, global reach, trends and conclusion

**Herminio Vicente Smania de Freitas**, CEO Providência  
President South America & Global Hygiene, PGI (Brazil)

11.00 > 11.30

COFFEE AND NETWORKING IN THE TABLETOP AREA

11.30 > 12.00

### DISPOSABLE HYGIENE PRODUCTS MARKETS IN LATIN AMERICA



- Trends in demography, and consumption of AHPs in Latin America
- Actual sales data of baby diapers/pants, sanitary towels/panty liners, adult incontinence pads/pants
- Consumer demands

**David Mackinson**, Senior Research Analyst, Euromonitor International (United States)

12.00 > 12.30

### THE ROLE OF PLASTICS FOR THE ENVIRONMENT AND QUALITY OF LIFE



- Raw materials, applications and contribution of plastics in health, transportations and technology
- Alternatives and levels of recycling
- Sustainable consumption

**Silvia Rolim**, Technical Advisor, Plastivida (Brazil)

12.30 > 14.00

LUNCH & NETWORKING IN THE TABLETOP AREA

## THE BUSINESS OF NONWOVENS IN HYGIENE



**MODERATOR**

**Krzysztof-Daniel Malowaniec**, Senior Vice President, Paul Hartmann (Germany)

14.00 > 14.30

## THE PERCEPTION OF HYGIENE IN ABSORBENT PRODUCTS



- Cultural differences in feminine hygiene products
- The potential to significantly increase consumer satisfaction with sanitary napkins
- Innovative solutions from Japan

**Daisuke Iguchi**, General Manager, Feminine Care Sales Business Unit, Unicharm (Japan)

14.30 > 15.00

## A COMPARISON STUDY OF THE ASIAN AND LATIN AMERICAN BABY DIAPER MARKET: PRODUCT PERFORMANCE AND DIFFERENTIATION



- Diapers, far from being a commodity, are highly engineered products
- Today's numerous options for product differentiation
- An overview of similarities and differences between emerging market trends

**Carlos Richer**, President, Richer Investment (United States)

15.00 > 15.30

## A REVIEW OF ADULT INCONTINENCE: RETAIL SOLUTIONS AND INSTITUTIONAL MARKETS



- Aging and its impact on the Latin markets
- The importance of adult diapers in the hospital and home
- The challenge of performance evolution in both institutional and retail markets

**Agustín Londoño**, Marketing Director, SCA do Brasil, (Brazil)

15.30 > 16.15

COFFEE & NETWORKING IN THE TABLETOP AREA

16.15 > 16.45

## FEMININE CARE MARKETS IN LATIN AMERICA



- Feminine hygiene products continue to evolve as manufacturers incorporate advanced technology and women's preferences
- As manufacturers respond to the needs of aging women, new opportunities arise for product producers
- Outlook for feminine hygiene business in Latin America including current players, regional preference and market data/trends

**Walter Spinardi**, Executive in Research & Development and Innovation Management, WPS Consultoria (Brazil)

16.45 > 17.15

## THE FUTURE OF WIPES IN LATIN AMERICA – THE WIPING MARKET CONTINUES TO GROW



- Today's markets in South America
- Trends and drivers in the market – which parallels may we draw from more mature markets
- How the consumer voice is heard and shapes the market

**Tania Hayashi**, Sales Manager South America, Suominen (Brazil)

17.15 > 18.15

TABLETOPS OPEN FOR NETWORKING



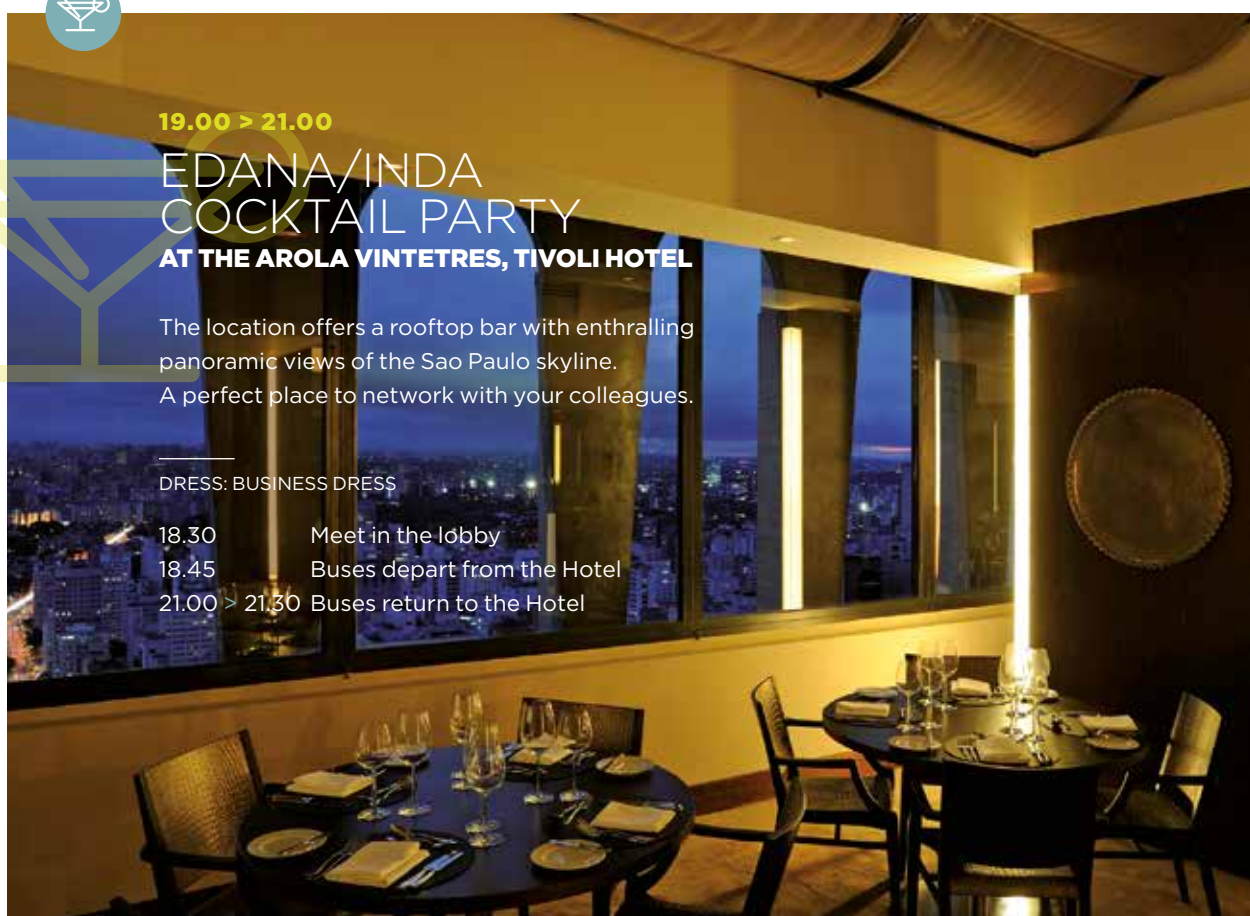
19.00 > 21.00

## EDANA/INDA COCKTAIL PARTY AT THE AROLA VINTETRES, TIVOLI HOTEL

The location offers a rooftop bar with enthralling panoramic views of the Sao Paulo skyline. A perfect place to network with your colleagues.

DRESS: BUSINESS DRESS

18.30 Meet in the lobby  
18.45 Buses depart from the Hotel  
21.00 > 21.30 Buses return to the Hotel



## Wednesday 4<sup>th</sup> March 2015

### THE PRACTICE OF NONWOVEN HYGIENE

08.30 > 18.00

#### Conference Registration at the Renaissance Sao Paulo Hotel

Please wear your badge at all times for easier networking.  
Registration desk opens from 15.00 for 3<sup>rd</sup> day registration

08.30 > 09.15

WELCOME COFFEE IN THE TABLETOP AREA



#### MODERATOR

**Pierre Wiertz**, General Manager, EDANA (Belgium)

09.15 > 09.45

#### REGULATORY FRAMEWORK FOR THE 3 AHP CATEGORIES

- An overview of the regulatory classification of AHP's in Latin America
- Implications of regulatory status on distribution, advertising, and warehousing
- Absorbency levels and test methods
- An overview of the regulations (FDA, TcOP) that the markets follow



#### KEYNOTE

**Joachim Harms**, Senior Director Global Regulatory Affairs Consumer Health Care, Johnson & Johnson Consumer (United States)

09.45 > 10.15

#### A REVIEW OF ABSORBENT HYGIENE PRODUCTS CLOSURE SYSTEMS

- Type of materials used
- Benefits provided
- How to characterise performance
- Future evolutions



**Damien Grimmelpez**, General Manager, Parafix (Brazil)

10.15 > 11.15

COFFEE & NETWORKING IN THE TABLETOP AREA

11.15 > 11.45

#### HYGIENE BUSINESS: TOWARDS SUSTAINABLE LOCAL MARKET GROWTH BY INNOVATION IN THE SOUTH AMERICAN MARKET

- Interest of local operations to better serve its customers
- Research capacities to drive an intensive development on innovative technologies
- Outstanding innovations include pioneering sustainable hygiene solutions
- Examples: HySorb odor control and "Mass Balance" approach based on renewable feedstock



**Sebastian Guarachi**, Business Director Hygiene South America, BASF (Brazil)

11.45 > 12.15

## THE FUTURE OF FLUFF PULP

- Global demand for fluff pulp continues to grow. Additional capacity required
- Fluff will continue to be a cost-effective component of absorbent and air laid products – providing comfort, fluid distribution, and absorbency to enhance optimal consumer experience
- Fluff suppliers are likely to introduce innovative enhancements to increase value, improving both the consumer experience and production processes
- The innovative trajectory of fluff will complement absorption chemicals in creating the optimal consumer product



**Rildo Martini**, Vice President, International Paper (United States)

12.15 > 12.45

## HOW ADHESIVE TECHNOLOGY SUPPORTS HYGIENE PRODUCERS TO RESPOND TO THE LATEST GLOBAL MARKETS TRENDS IN HYGIENE

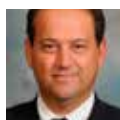
- The trend towards thinner cores, including a comparative study on diaper core performance within Latin America
- Understanding the issue of odour management in adhesives to meet growing consumer sensitivity
- The increasing popularity of pull up pants, and how to manage market requirements
- Ensuring supply assurance – a feedstock outlook



**Fernando Raszl**, R&D Technical Manager Latin America Region, HB Fuller (Brazil)

12.45 > 14.00

LUNCH & NETWORKING IN THE TABLETOP AREA



### MODERATOR

**Sal Alvarado**, Industrial Adhesives – General Manager, Henkel (Brazil)

14.00 > 14.30

## SOLUTIONS FOR INCREASED FIT AND COMFORT OF MODERN BABY AND ADULT INCONTINENCE DIAPERS: DIFFERENT OPPORTUNITIES FOR “OPEN” OR “PANT” DIAPERS

- The case of open type diapers: overview of different elasticization structures adopted on diapers in the global market and Latin American countries
- New methods for in-line or off-line lamination of diapers' back ears
- The case for pant type “pull-on” diapers: solutions for MD or CD manufacturing with elastic strands or with elastic film solutions
- Opportunities for GLUELESS™ application of elastic strands



**Alessandro D'Andrea**, Marketing and Innovation Manager, Fameccanica (Italy)



14.30 > 15.00

## LAMINATION SOLUTIONS FOR HYGIENE ABSORBENT PRODUCTS THROUGH THE VALUE CHAIN

- Sustainable solutions, bringing differentiation, innovation and competitiveness to the hygiene market
- Lamination technologies available in the market could bring balance to a clothlike backsheet product in terms of basis weight, recyclability, barrier properties, softness, waste reduction etc
- A deep understanding on the interaction between raw materials such as polyethylene, the conversion technology as well as the final functional attributes needs to be considered to achieve a sustainable solution



**Beatriz Goldaracena**, Latin America Hygiene & Medical Marketing Manager, Dow (Brazil)

15.00 > 15.30

## PACKAGING MACHINES FOR DISPOSABLE PRODUCTS

- Technology solutions for an optimal package
- Market trends for disposable products and packages
- Innovations for packaging



**Rolf Geissinger**, Managing Director, OPTIMA (Brazil)

15.30 > 16.30

COFFEE & NETWORKING IN THE TABLETOP AREA

## BACKGROUND AND TRENDS IN MEDICAL NONWOVENS



**MODERATOR**

**Jorge Crespo**, Executive Director, Medical, Mada Nonwovens (Kingdom of Saudi Arabia)

16.30 > 17.00

## NONWOVENS FOR MEDICAL USES, A SUSTAINABLE SOLUTION

- Introduction: the importance of nonwovens for medical uses
- Life Cycle Assessment (LCA) to measure environmental performance
- LCA for surgical kits in Brazil



**Yuki Hamilton Onda Kabe**, LCA Specialist, Braskem (Brazil)

17.00 > 18.00

## MEDICAL NONWOVENS PANEL DISCUSSION

This sixty-minute panel session and panel discussion will examine a number of reasons why disposable drapes and gowns are not used extensively throughout Latin America.

Panelists will:

- Discuss how hospitals' social responsibilities have hindered the adoption of nonwoven drapes and gowns
- Dispel the myth that disposable textiles are too expensive to use in emerging markets
- Provide an outline for manufacturers to educate medical staff on the security disposables provide that laundered fabrics simply cannot.
- Discuss the role that other technologies "i.e. reusables" affect nonwovens penetration in Latin America



**Myra Johanssen**, Product Manager, Lifemed (Brazil)



**Carlos Velez**, Principal of Union Medical (Colombia)



**Jorge Crespo**, Executive Director, Medical, Mada Nonwovens (Kingdom of Saudi Arabia)



19.00 > 21.00

## HOSTED DRINKS

at the Havana Club, Renaissance Hotel Sao Paulo  
by EDANA/INDA



## Thursday 5<sup>th</sup> March 2015

### FUTURE & OPPORTUNITIES FOR DURABLE NONWOVENS

08.30 > 16.30

#### Conference Registration at the Renaissance Sao Paulo Hotel

Please wear your badge at all times for easier networking.

08.30 > 09.00

WELCOME COFFEE



#### MODERATOR

**Dave Rousse**, President, INDIA (United States)

09.15 > 09.45

#### OPPORTUNITIES IN DURABLE AND INDUSTRIAL NONWOVEN APPLICATIONS AND MARKETS

- Durable and industrial nonwoven products in the South American region
- Growth opportunities for nonwoven technologies and their applications
- Trends in the area of durable and industrial nonwoven technologies



**Rick Jezzi**, Consultant, A.D. Jezzi & Associates, LLC (United States)

09.45 > 10.15

#### BARRIERS TO BUSINESS: THE BUSINESS ENVIRONMENT IN BRAZIL

- Improvements in Brazil's business environments have helped FDI but difficulties remain within regulatory and legal systems.
- Obstacles frequently experienced by foreign investors include tariffs, labor concerns, and infrastructure investments.
- Insight for investors to protect against, avoid or minimize problems



**Welber Barral**, Managing Partner, Barral M Jorge Consultants (Brazil)

10.15 > 11.00

COFFEE & NETWORKING

11.00 > 11.30

#### GREEN POLYMERS FOR FILMS AND NONWOVENS – SAME BUT DIFFERENT

- Renewable value chain, understanding the Green Life Cycle
- Commercial possibilities with GPE
- Brand Value, actual market business case



**Regina Penzo**, Commercial Manager for Renewable Chemicals, Braskem (Brazil)

12.00 > 12.30

## NONWOVENS FOR THE SHOE SEGMENT

- Shoe segment for nonwovens
- Market trends in Latin America and globally
- Perspectives



**Danilo da Costa Paula**, Sales Manager, Freudenberg Nonwovens (Germany)

12.30 > 14.00

LUNCH & NETWORKING



**MODERATOR**

**Jean-Michel Anspach**, Technical & Education Director, EDANA, (Belgium)

14.00 > 14.30

## HIGH-PERFORMANCE SPUNMELT TECHNOLOGY FOR INDUSTRIAL NONWOVEN APPLICATIONS

- The technical nonwoven market
- Market requirements for technical nonwovens
- Production concepts
- Key-technology facts; recent developments



**Ingo Möhlmann**, Product Manager Nonwoven, Oerlikon Neumag (Germany)

## AUTOMOTIVE MARKETS



**MODERATOR**

**Jean-Michel Anspach**, Technical & Education Director, EDANA, (Belgium)

14.30 > 15.00

## TRENDS IN LIGHT VEHICLE TECHNOLOGY AND THEIR IMPACT ON NONWOVENS

- Development in the global car, truck and bus sectors
- Key trends and their impact on nonwovens
- The main applications for nonwovens
- Prospects for nonwovens and nonwoven suppliers



**Holger Richter**, Partner and Director Sales Automotive and Technology, Schlegel & Partner (Germany)

15.00 &gt; 15.30

## OUTLOOK FOR LATIN AMERICAN LIGHT VEHICLE MARKETS AND IMPACT ON THE SUPPLY CHAIN

- Sales and production outlook for biggest markets in the region.
- Argentina and the role it will play in Brazilian production.
- Brazilian market outlook and the developments in coming years such as: OEM investment in the region, development of premium market, decentralization of the industry outside Sao Paulo, and impact of INOVAR.



**Guido Vildoza**, Manager, Latin America Light Vehicle Sales Forecasts, IHS Automotive (Brazil)

15.30 &gt; 16.00

## SYNTHETIC FILTER MEDIA AND EFFECT OF HOT OIL AND ETHYLENE GLYCOL CONTAMINATION IN HEAVY DUTY DIESEL ENGINE

- New synthetic structure
- Focus on oil filtration



**Marcelo Polozzi**, Product Development Manager, South America, Ahlstrom (United-States)

16.00 &gt; 16.30

THANKS & CLOSING REMARKS

16.30 &gt; 17.00

GOODBYE DRINK

## EDANA AND INDA WOULD LIKE TO THANK

Jorge Saito (ABINT) Krzysztof-Daniel Malowaniec (Paul Hartmann),  
Rick Jezzi (A.D. Jezzi & Associates), Jorge Crespo (Mada Nonwovens)

This programme may be subject to last-minute changes and cancellations.