

The Hygiene Market in Latin America - Will the Growth Continue?

• **Rolando Dominguez, PGI LAO**

Latin America has been a growing market in all the hygiene sectors, and special attention should be paid to the Adult Incontinent market. This presentation will address pertinent questions: What has fueled the growth and can that growth be accelerated? What role have the country or regional players played in the last few years? What effect do regional economic issues have on the growth of the Latin America hygiene market? What role will the Brazilian market play in the next few years?

The Role of IP Analytics in Technical Management

• **Rick Jezi, A.D. Jezi & Associates, LLC**

A discussion on how IP management can be used as an effective tool to understand technology trends, company strategies, and help direct development efforts for organizations.

Innovation Trends in Film-Based Outercover Designs for Absorbent Hygiene Products

• **Keith D. Brechtelsbauer, Berry Plastics Corporation**

This paper will review the trends and achievements that film-based outercover developers have accomplished over the years in order to consistently meet the challenges outlined by absorbent product manufacturers and marketers. The focus areas will be: cost reduction, product design and decoration. This presentation will walk through the inter-relationships that these trends have had on PP versus PE based structures and how lower gauge materials were developed to adjust to the incorporation of nonwoven outercovers. The trends in chassis design continue to impact film based structures in terms of cost savings, breathability, wetness indicators, decoration and discretion. This paper will review how film and outercover developers have innovatively responded to these industry trends and will continue to collaborate with hygienic product manufacturers to realize novel product design and value into the future.

Global Opportunities in Medical Barrier Nonwovens and Manufacturing Economics

• **David Price, John R. Starr, Inc.**

This presentation provides an overview of the global and regional markets for medical barrier nonwoven businesses and technologies used in operating room drapes, gowns, and related protective products. The presentation will highlight recent and upcoming changes in this business, and how these changes will force new business and investment strategies for roll goods producers and other value chain participants. A perspective on manufacturing cost benchmarks will be provided.

Fluff and Absorbent Paper Pulps: Supply, Demand and Dynamics - 2010

• **Rodney Young, RISI**

The fluff pulp industry has been experiencing interesting times in the last year with supply interruptions and high selling prices. Although fluff pulp generally tracks the pricing of paper grade softwood pulps, fluff pulp markets have had their own unique set of circumstances that will be

reviewed in this presentation. Forecasts of supply/demand and possible changes in pricing will be covered.

What Soaked Up All the Superabsorbent in 2010?

• **Ian Davenport, Davenport International Associates, LLC**

Seeds sown after the 2005 SAP shortage have now been harvested. Producers were unable to justify new capacity in SAP and the key raw material, acrylic acid, so they stopped investing. Predictions of a shortage of SAP were not heeded. This paper describes the build-up to 2010 and the current supply/demand situation. What is being done to address the problem? What does the future hold?

The State of the Art in High Speed Converting

• **Stefano Romanelli, ADE s.r.l.**

With almost half a century of history, the diaper machinery industry is one of the most advanced and sophisticated branches of the electro/mechanical industry. Valued at over \$800 million per year, the industry employs more than 6500 people and promises significant growth for the next several years. Even though the industry started in the U.S. and Japan, the overwhelming majority of companies are currently located in Italy and China, which set the standards for the industry worldwide. This paper reviews the players and their efforts in high-speed converting.

Bicomponent Fibers for Airlaid Fabrics - Choosing the Right Tool for the Right Job

• **Henning Skov Jensen, ES FIBERVISIONS ApS**

There are many parameters that have to be considered when selecting the right bicomponent fiber for a specific airlaid product feature. This paper will highlight the most important fiber parameters to take into consideration when engineering a new airlaid composite.

High-Speed Automated Inspection of Disposables - What Can Be Done?

• **Wei Siong Tan, AccuSentry Inc.**

At 1000 diapers per minute, machine vision is playing an ever-increasing role to achieve higher overall equipment efficiency on modern diaper production lines. One effective way to utilize the enormous amount of data available with 100% product inspection from a machine vision system is to provide real time feedback to allow the production personnel to standardize the setup of the different product styles. Based on the data collected and actual production variations, center lining can be established for certain key parameters of the process. Limits can be set to alert the operator to take corrective actions. Automatic alerts enable the production personnel to resolve problems and exceptions before they become a production issue. Identifying the critical measures to focus on and formulating the corrective actions that correlate with each critical measure is key to improving the production efficiency. This Center Lining approach allows the same product style to be setup the same way across shifts, operators, and time. As a result, variability can be reduced to achieve better product consistency, better quality, and a reduction in waste percentage.

Hanging by a Wire

• John K. Schauer, *AstenJohnson*

In the production of nonwoven material, one of the most important aspects of a product is the raw material source you choose to work with. The *second* most important aspect of production is the forming wire, or forming fabric, as they are sometimes called. The paper explores what goes into the decision for choosing the right fabric, and the properties associated with these wires used in the production of spunbond, airlaid and spunlace materials. How is innovation keeping up with the new faster machines that are producing lower denier, lighter material?

New Methods of Producing Fibers in High Volumes

• Evan E. Koslow, *GABAE Development*

Production of nanofibers in high volume has been a general goal of the nonwovens industry, but economical and practical means to produce such fibers have eluded large-scale commercial development. Current approaches include production of submicron melt blown fibers, fibrillating staple fibers usually of cellulose or acrylic resins, spinning fibers or films that can be subsequently split using solvents and/or exposure to stress, centripetal spinning of fibers from the edge of spinning disks or from small orifices, or electrospinning. After a brief review of these techniques that is by no means a comprehensive review, we will focus upon a new method that appears to represent an entirely new approach with surprising capabilities.

A Global Overview of the Tissue and Hygiene Industry

• Jared Conway, *Euromonitor International*

Many tissue and hygiene products are perceived as necessities, and this is fundamental to ongoing market growth at a time of economic challenge. The perception of necessity increases with rising income levels. Euromonitor International's presentation will offer a current assessment of the global retail tissue and hygiene industry, reviewing market sizes, brand and company performance as well as industry and demographic trends shaping the industry. Euromonitor will also examine forecast market analysis and look at areas for future growth and development.

Winding and Slitting: The Enabler for Quality and Efficiency

• Jesús López Marin, *Edelmann Technology GmbH & Co. KG*

As in any process, the weakest element in a production line becomes the limiting factor. Until recently, winders and slitters often limited the throughput of high-speed spunbond lines, making cumbersome bottleneck management necessary. Thanks to the latest developments of high-speed in-line slitter-winders for production rates of up to 800 m/min and the hybrid winding system designed for throughputs beyond any known requirement, those days are gone. The winder and slitter are being chosen by roll good producers to improve the quality of rolls, line efficiency and overall end-of-line process optimization. Consequently, it is a key factor in distinguishing their product with regard to roll quality and to gain economic advantage through cost competitiveness. The presentation will elaborate on equipment features to achieve these improvements.

The Fastest Path to a Dryer Diaper

• Matt J. O'Sickey, *Tredegar Film Products Corporation*

Tredegar Film Products presents an innovative approach to significantly improve fluid management in absorbent hygiene products through the use of Aquidry Plus™ Acquisition Distribution Layer (ADL) - its latest 3-dimensional apertured film. This patented technology creates multiplanar structures on the Aquidry Plus film that contribute to both tactile and fluid management advantages, providing greater coverstock dryness instantaneously and continuously, especially under conditions of heavy insult. Aquidry Plus further facilitates faster fluid distribution and enhanced core utilization bringing consumers greater comfort and superior fluid management, while enabling manufacturers new avenues to optimize core design and cost.

The Janus Concept - Past, Present and Future Pull-on Diaper Designs

• Alessandro D'Andrea, *Fameccanica.Data S.p.A.*

According to a legend in Roman mythology, the god Janus had received the gift to see both past and future. This paper will present the past and the present of pull-on/pant diapers and Janus will provide his perspective and a prediction for a future with seamless pant-type diapers.

Hubris, or the Ramblings of an Old Man

• Andrew Urban III, *Urban Consultants, Inc.*

This speech offers the viewpoint of one industry veteran about people in our industry who thought trees would grow to touch the sky, people who decided to make an obscene gesture (verbal or written) towards K-C or P&G, and people who thought one size fits all. What's good for GM is good for the U.S.A.

New and Thin Diaper Designs Compared

• Mark Bolyen, *Marketing Technology Service, Inc.*

Last year's paper entitled "The Wheel of Time" presented data on predictive testing for diaper performance in the real world. Several mainstream diapers were compared using mannequin and other tests. Since last year Pampers Cruisers and Swaddlers Dry Max™ designs, with different constructions vs. earlier prototypes, have been introduced to the market along with new designs from competitors. This paper compares the new designs to those presented in 2009.

How Sustainable is Sustainability?

• Richard Chapas, *Chapas and Associates*

Every company and trade group is jumping on the sustainability bandwagon. The benefits and the challenges of this megatrend are analyzed from a triple-bottom-line perspective. How to develop a sustainability project portfolio that drives growth and innovation is the real question. Specific examples are cited, both where success was achieved and where problems occurred. Reporting, carbon credits, and greenwashing will all be addressed.

Innovative Absorbent Technologies

• Dan Stauffer, *H.B. Fuller*

Moisture management is critical in nonwoven disposable constructions. Typically, a cellulosic absorbent core is augmented with granular superab-

sorbent polymers which enhance absorption capacity and efficiency while making the construction thinner for consumers. Two new innovations, a water-based superabsorbent binder and a hot melt superabsorbent, have been developed which provide product design engineers a means to target absorbency and create new functionality in existing materials by strategically placing superabsorbent in their product and having it stay where it was applied. Additionally, when this waterborne superabsorbent binder or hotmelt superabsorbent is applied to a nonwoven or tissue, it can change the properties of those materials by making them significantly more absorbent, creating new uses and value for nonwoven or tissue manufacturers.

The Forest Certification: Progress and Potential

• **Rick Cantrell, Sustainable Forestry Initiative (SFI Inc.)**

Forest certification has become an important element in the nonwovens sector's commitment to sustainability. Consumer demand for responsible products are increasing; yet only 10% of the world's forests are certified. Inclusive procurement policies are driving demand for certified product and more certified forests. Working together, the nonwovens industry, certification programs, retailers and consumers can ensure products from responsible sources while at the same time ensuring forests for the future.

Liquid Cellulose: A Pyrolysing Success!

• **John M. Tharpe, Marion Engineering & Technical Services, Inc.**

This presentation introduces the systems, apparatus, and methods for optimizing the production of ecologically-sound energy products from biomass via fast pyrolysis. In development for three years, this energy converting system employs known technology in a novel apparatus, achieving efficient conversion of biomass into liquid, solid, and gaseous fuels that are readily usable in current thermal and mechanical engines! The system is thermally auto-energy, providing all of the thermal energy required, and with heat recovery can produce over fifty percent more electrical energy than it consumes!

Developments in the Fluff Pulp Industry

• **Don Young, Marketing Technology Service, Inc.**

This paper will take a look at current fluff pulp requirements in today's hygienic products and explore the relationship between the different components of the paper pulp market and the fluff pulp market. The strengths, weaknesses, opportunities and threats (SWOT) will also be explored with a focus on new technologies that could reduce the pulp content and possibly overall use of fluff pulp in hygienic products.

How Green is My Valley? - Bamboo, Corn, Cotton and Woodpulp Compared

• **Jim Robinson, Tufco Technologies, Inc.**

An objective comparison of various primary raw materials that are commercially available for wet wipes, both for the production of substrates and packaging components, is presented. End-use performance, absorption, physical properties, barrier properties and environmental impact will be analyzed. With the growing number of environmental claims being touted

on wipes packaging, the objective of this paper is to define as narrowly as possible how "green" a combination of components really makes a product.

The Dynamic Hygiene Industry - Perspectives on Economic Recovery, Product Innovation and Material Price Volatility

• **Pricie Hanna, John R. Starr, Inc.**

The last year certainly has been dynamic with challenging changes in consumer and hygiene competitor reactions to the economic decline and recovery, significant product innovations, and substantial material price volatility. This presentation will assess the major hygiene market and product developments that have emerged and their impact on future trends. Perspectives will be provided on key examples of hygiene product growth in developing markets, new materials and product designs that are driving market success, product strategies for sustainability, and the positive and negative impact of the internet.

TencelWeb™ - Progress and Promise

• **Steven Winter, Weyerhaeuser Company / Lenzing AG**

The benefits which cellulose staple fibers bring to nonwoven products are well-known. The direct manufacture of cellulose webs from polymer solution has also been a subject of research for many years now, but this approach has not yet delivered products with a significant commercial impact. In the past, Lenzing and Weyerhaeuser showed results of laboratory-scale feasibility studies. These investigations revealed interesting fiber and nonwoven properties which could not easily be produced by the existing technologies. Against the background of the recently installed pilot line, this paper will provide an update on developments, both process and product, as we work towards a commercially viable technology.

Increasing Value and Profits by Transitioning from B2B to B2C

• **Donald Sheldon, DAS Consulting**

In 25+ years of industry management experience, working for both suppliers and converters, I have seen a lot of dysfunctional supplier/converter interactions where neither the supplier nor the converter wins. This paper will share some insights as to why this occurs and what needs to be changed. Tools used to create successful "Win - Win" interactions will be presented.

Green Revolution - And Hopefully the End of Stupid

• **James P. Hanson, Marketing Technology Service, Inc.**

Few Americans are willing to defend the interests of companies who spill oil in environmentally sensitive waters. Cleanup efforts focus on containing the oil with booms and then using mechanical equipment to remove floating oil and tar balls. The major market for most oil mat producers is oil dripping from working machinery, and fabrics are commonly either meltblown or cellulose/recycled fibers to lower material cost to the absolute minimum. The existing materials are not particularly suitable for absorbing oil from spills on shorelines and in marshlands, nor for absorbing oil sheen. This paper is about new airlaid materials that address the problems, how well they can work, and the response of government agencies and the spillers of oil to date.