

FINAT ELF 2025 looks at label industry's future

AI and environmental sustainability dominated the discussion at the annual European Label Forum. On behalf of FINAT, James Quirk reports.

The FINAT European Label Forum 2025 welcomed 240 delegates from 26 countries to Amsterdam for two days of high-level conference sessions discussing key industry topics such as environmental sustainability, artificial intelligence and technological innovation.

A table-top exhibition running alongside the conference featured 32 leading industry suppliers, including gold sponsors Avery Dennison, Beontag, Labelexpo/Labels & Labeling, Mark Andy and UPM Raflatac.



Also during the event, FINAT unveiled the winners of its 45th annual Label Competition and bid a fond farewell to the recently-retired awards judge Tony White and his wife Connie – an integral part of the competition for many years.

Wednesday 21 May

Winners of FINAT Label Competition announced

FINAT's master of ceremonies **Vlad Sljapic** announced the winners of the **45th FINAT Label Competition 2025** on the first evening of the ELF. Judging took place under the new chairmanship of Murat Sipahioglu of Heidelberg Turkey following the retirement of Tony White, with the panel completed by Steve Wood, another long-time judge, and newcomers Phil Baldwin of BOBST UK, Fahri Ilazi of Kocher+Beck and Mick de Reuver of FroQ Brandservices.



The competition attracted 184 entries from 47 companies representing 21 countries around the world, demonstrating the awards' global popularity. Türkiye and Austria topped the list of countries entering with a combined total of 47 submissions, followed by Spain with 18 and Germany with 16. The highest number of entries by category was Wines (38), followed by Beers and Spirits (28) and Sets of Labels (16). The number of entries using digital as one of their main processes was 88.

This year, the Food & Beverages and Industrial & Automotive categories, previously included under General Applications, were separated – increasing the number of categories from 21 to 23. “This modification not only enabled us to see how many participants were interested in participating in each category, but it also showed that Food & Beverages is still a popular category,” said judging panel chairman Murat Sipahioglu.

Best in Show



The Best in Show award went to Turkish converter Sancak Etiket for Nicea Olive Oil, of which the judges said: “This was a really impressive label which was admired by the entire judging panel and unanimously chosen as a main winner.” The label was joint-winner of the Marketing/End-Uses Group.

The other joint-winner of the Marketing/End-Uses Group was Multi-Color Corporation North America Wines, USA, for Astraeus Single Malt Gin. The winner of the Printing Processes Group was Çiftsan Label and Packaging Company, Türkiye, for Royal Caviar Shampoo. The Non-Adhesive Applications Group award went to Optimum Group, The Netherlands, for Best Moments Macarons. The Innovation Group winner was Schreiner Group, Germany, for Smart Syringe Box. Special Judges Awards were given to three companies: Multi-Color Corporation North America Wines, USA for Astraeus Single Malt Gin; Marzek Etiketten + Packaging, Austria, for Braunrath Blaufränkisch; and CCL Label Trittenheim, Germany, for Christmas Label. [Click here](#) for a full round-up of the winners.

Thursday 22 May

FINAT president **Philippe Voet** welcomed delegates back to Amsterdam 10 years after the event first took place in the Dutch city and was rebranded as the European Label Forum. He outlined the key challenges cited by an IBM survey of worldwide CEOs, with supply chain performance now earmarked as the most important – having ranked near the bottom only a few years ago. Talent recruitment and retention, and business model innovation complete the top three. “The rest of the decade will be the most exciting years yet,” he asserted. “Innovation is key to solving these challenges. Despite fewer people working in the industry, we produce more. So we should not be too negative – we know how to innovate. Our industry will change. There is no way to stop it; we must embrace it. That’s why the coming years will be so exciting.”



Voet introduced FINAT’s moderator-in-residence **Bert van Loon**, who in turn teed up the morning’s first session.

Session 1: Geopolitics and socio-economic trends

The keynote speaker, returning by popular demand following his excellent presentation at the ELF in Vienna in 2023, was **Ron Keller**, former Dutch Ambassador to Ukraine, Russia, Turkey and China, former Director at the Eastern Europe Bank (EBRD) and a top advisor to the

European Union, the International Monetary Fund, the World Bank, and to the Dutch Ministries of Finance and Foreign Affairs.

"Two years ago, we were all still shellshocked by the war in Ukraine. But the geopolitical situation has become even more complex," he said. He outlined the underlying forces that have led us to where we are today. "In the wake of the Cold War, global superpowers proclaimed to be on the same page. They aspired to cooperate. Almost instantly, proxy conflicts in other parts of the world, notably in the Middle East and Africa, died out. But now these superpowers are colliding again."



These geopolitical tensions are negative for the global economy, and expose Europe's lack of strategic autonomy in areas such as defence and energy. "The EU focuses on economic cooperation but without any further political deepening. Its lack of internal reform has made us lag the US economically and in innovation."

Yet despite these challenges, Keller described himself as "optimistic". "There are also opportunities, for example in greater regional cooperation." He cited the example of a recent agreement between China, Japan and Korea to expand trade cooperation, as well as South America's Mercosur trading block enhancing its cooperation with the EU. "The EU has begun to wake up. We were much too passive over the past 35 years. We realise we need to enhance not only our competitiveness, but also that we must reform."

He called for the implementation of the Draghi Report – "I have it tattooed on my back; I recommend you all read it," Keller joked. Written by former Italian Prime Minister Mario Draghi, the report calls for "completion" of the internal market, with strengthened competitiveness, a common foreign and defence policy, and better governance.

Session 2: Labels of the future – navigating change in a dynamic market

FINAT managing director **Jules Lejeune** looked at the European label business landscape in 2024 and 2025. Following the supply chain disruption in 2022 and destocking of materials in 2023, the first two quarters of 2024 had seen accelerated growth, but this slowed in the second half of the year due to the sluggish economy. "In spite of that, 2024 volumes were at the level of 2016 – a significant improvement because in 2023 we were still at the 2013 level," he said. "We also see a lot of structural change in the composition of labelstock demand. White coated raw materials declined in share, but remain the largest category. Direct thermal is on the rise because of e-commerce and personalisation. PP rolls have significantly increased their share of the total market."



Each of the top five European label markets is consuming less than in 2021, except for Spain, "which has recovered quite well", said Lejeune. "In Germany, for instance, we see the impact of industrial decline and the increase in energy and raw material costs." These top five countries – UK, Germany, Spain, France and Italy – have increased their share of labels consumed in Europe from just over 50% in 2021 to 60% in 2024, while the rest of Europe declined."

Lejeune outlined the five key industry drivers: sustainability, customer demand, operations, innovation, and corporate strategy. He called for delegates to consult FINAT's six-page "Roadmap for European label printing and packaging companies", an AI-generated summary of more than

700 pages of reports and policy documents, including the Draghi Report and the WEF Future of Jobs Report, which details scenario-planning options for the next five years.

Industry trends



Corey Reardon, CEO of AWA Alexander Watson Associates, outlined label industry trends in Europe. “Innovation and sustainability are going to drive the industry forward, wherever you are in the supply chain,” he said. There is a growing emphasis on digital product identities, AI and circularity. “Collaboration is key – success can only come from working together.”

The global label market, across all formats, uses around 74 billion sqm of material annually; 48% is produced in Asia-Pacific, 22% in Europe and 18% in North America. By format, 39% of the total market is self-adhesive, 35% is glue-applied and 20% is shrink sleeve labelling.

“In the European market, food and beverage consumes by far the most labels across all the different applications, but is actually a very low user of self-adhesive materials,” said Reardon. “The fastest-growing application overall is the transport/logistics segment, which shows the growth in VIP (variable information) labelling.”

Structural shifts are underway, said Reardon, with flexible packaging and linerless label applications on the rise, and growing interest in RFID and direct-to-container print. M&A activity has slowed, meanwhile, likely due to interest rates and the economic environment. “There is still lots of consolidation to come,” he said.

Consumer habits

Linda Lichtmess, strategic market analyst, Food & Drinks, at Euromonitor, discussed global consumer trends for 2025, emphasising healthier lifestyles, strategic spending, and sustainability. Consumers are prioritising long-term value over immediate savings, focusing on product quality and durability.



The impact of inflation and economic uncertainty, particularly due to political factors like Trump, is significant, leading to declining consumer confidence.

“Most countries show declining consumer confidence. There's a lot of uncertainty,” she said. “Consumers are worried about their jobs, paying the rent, and whether there is actually money to spend.”

Health investments are shifting towards long-term wellness, including functional foods and mental well-being. Sustainability remains important, though financial constraints limit choices. AI is gaining use but faces scepticism due to inaccuracies. Information overload is fuelling demand for simplicity: clear packaging and transparent messaging can help brands stand out as consumers seek clarity and ease in decision-making.

Innovation equals sustainability



Paul Jenkins, founder and MD of The PackHub, a UK-based packaging innovation consultancy, discussed the shift towards sustainability in packaging, emphasising the need for innovation to address environmental concerns. He highlighted The PackHub's Innovation Zone, which updates weekly with 33 new packaging innovations, and the Patent Zone, focusing on significant patents. "Just about every innovation we track in the Innovation Zone and Patent Zone is related to sustainability," he said. "So it's an unquestionable reality that sustainability drives innovation, and it's a big opportunity."

Jenkins noted the impact of the Blue Planet 2 program in 2018, hosted by David Attenborough, which led to increased consumer awareness and stricter regulations such as PPWR. He outlined five key sustainable packaging trends: recycling, bio packaging, paperisation, refill/reuse, and reduction. Examples include mono-material labels and bio-based packaging.

Jenkins then formed part of a panel discussion, moderated by **Bert van Loon**, alongside **Gabriela Neves** of All4Labels, **Christophe Beke** of Asteria Group, and **Arno Melchior** of Reckitt, which looked at the future of the label and packaging industry. The wide-ranging discussion highlighted the requirement for not only recyclable packaging but sustainability throughout the operation, the importance of integrating AI, the need for greater collaboration between brands and converters, and the challenge of attracting young professionals to the industry.



Session 3: Sustainability in labels and packaging

An extended focus on sustainability kicked off with an expert panel, moderated by **Bert van Loon**, discussing "Adapting to the new reality of PPWR", which featured FINAT's **Pablo Englebienne**, **Francesca Stevens** of Europen (tuning in online), senior consultant **Jan 't Hart**, **Marius Tent** of CELAB Europe, and **Jean-Emile Potaufoux** of PRE/Recyclclass. The EU's Packaging and Packaging Waste Regulation sets strict recyclability, reuse, and recycled content targets by 2030. The panel emphasised the urgency of these targets and the importance of acting now to avoid being overwhelmed by the challenges of PPWR compliance in the future. Delegates were

updated on the progress of the CELAB 2.0 initiative to drive circularity for self-adhesive labels, and the Holy Grail project, which uses digital watermarking technology to improve sorting and recycling of packaging. The role labels can play in facilitating recycling – and the importance of adhering to Design for Recycling guidelines – were also highlighted.



Disruptive forces



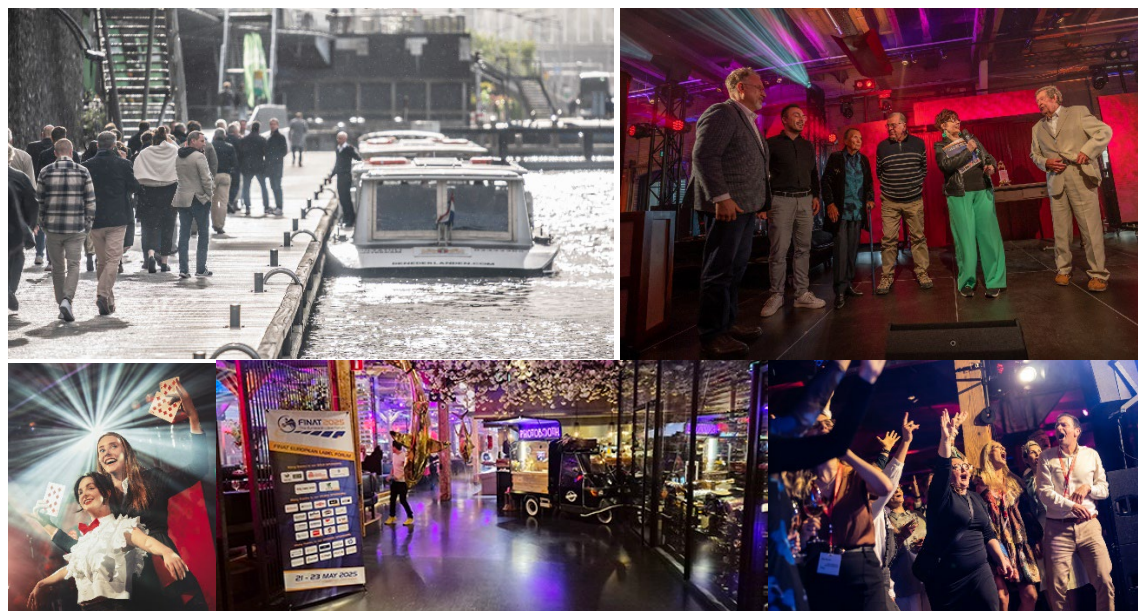
Thomas Reiner, CEO of Berndt & Partner Group, identified environmental issues, regulation, digital transformation and workforce challenges as the four disruptive forces that are reshaping the industry. PPWR and global EPR regulations demand radical packaging redesign: the industry must focus on recyclability, material reduction, mono materials, and PCR use or risk market exclusion. “Labels will still be needed in the future, but they will have to change,” he warned.

“Compatibility with recycling is key.” He urged delegates to drive the change with seven calls to action: revise your product portfolio and business model strategy; rethink how you approach the needs of your customer base; innovate processes and services, not just products; accelerate your operations and decision-making; establish more collaboration across the value chain; put your people first – automate where possible and develop when necessary; and boost internal and external communication.

FINAT’s master of ceremonies **Vlad Sljapic** closed the day’s proceedings by introducing the association’s upcoming new e-learning platform – a partnership with the Open University. He then presided over an interactive “pub quiz”, posing delegates with multiple-choice questions which they answered by raising different-coloured papers into the air, sitting down when knocked out. After nearly two decades writing about the industry, your correspondent ought not have been knocked out as early as he was – nor beaten by his less-experienced younger brother. **Congratulations to the winner: Szymon Ignarski from ETI Converting.**



Dinner at The Harbour Club was reached by canal boats and featured riotous entertainment from a team of magicians and a live band, as well as a touching tribute and farewell to Tony White, the recently-retired chairman of the FINAT Label Competition judges, and his wife Connie.



Friday 23 May

Session 4: Technology innovation

Before kicking off the second day of the programme, FINAT showed an AI-created video building on the 2030 scenarios presented the previous day. This video about the future of the label industry highlighted the importance of labels not only for product decoration but also for regulatory compliance and supply chain transparency. The label “is where consumer engagement meets supply chain intelligence”, said the AI narrator.

Edge computing



Bram Verhoef, co-founder and director of customer success at Axelera AI, spoke about how “edge computing” is set to revolutionise manufacturing over the next two years. Edge (as opposed to cloud-based) computing is an AI-based technology which enables devices in remote locations to process data and perform actions in real time. He gave real-world examples of how it is transforming production lines, enhancing efficiency and driving innovation. “We are moving toward ubiquitous and distributed Artificial Intelligence,” he said. “AI models are growing exponentially, and can unleash new applications.”

In agriculture, AI-powered drones can water crops. In retail, it will enable fully autonomous shops. In healthcare, AI can identify diseases or predict the likelihood of someone getting a particular disease over the next year. “Increasingly, it can read neural signals and reproduce images of what is being thought about,” said Verhoef.

To reduce accidents in the workplace, AI can detect what personal protection equipment is being worn. Robots which incorporate animal-inspired movements can be deployed in factories for maintenance checking. They can pick things up with their hands and place them precisely. “Humanoid robots are going to assist humans in many heavy jobs,” he said.

Increasingly, AI can be creative. Verhoef showed an example of asking AI to create a label for his company, incorporating the correct brand colours, logo and specific information. Though the initial result was “good, but slightly boring”, a few more prompts resulted in a more creative version “which made a link between what we are doing as a company and the more creative label it produced”.

Narrow and wide web converge

Jörg Schönwald, managing director of Schönwald Consulting, spoke about the convergence of narrow and wide web printing. As label printers install presses with wider web widths, they can tackle short-run flexible packaging work, for example, which Schönwald identified as a particular opportunity.



Flexible packaging consumption in Europe was 4.8 million tons in 2024, with 86% of it used in food, beverage and pet food applications. Stand-up pouches have proved particularly popular, with consumption rising from 2.7 billion units in 1996 to nearly 60 billion today. There is a clear trend towards the use of mono-materials in the sector – which now make up around 58% of flexible packaging films in Europe. Though most of these films are ready for recycling now, only around 5-7% are in fact recycled. “There is a blurring between narrow, mid and wide web,” said Schönwald. “The trends towards shorter runs and more personalisation provide an opportunity for narrow and mid web printers to enter this market.”

The flexible packaging discussion continued with a panel, moderated as ever by the indomitable **Bert van Loon**, which featured **Erik van Sloten** of BOBST, **Michael Schrameyer** of Coveris Flexibles, **Alex Aarslew-Jensen** of Nilpeter, and **Noël Kasmi** of adapa Group. The group were unanimous in their belief in the growth potential of flexible packaging, highlighting the advantage label converters have thanks to their experience in dealing with fast lead times and short runs. They warned of challenges such as regulatory compliance and the complexity of using flexible packaging materials, and recommended that label printers partner with wide web converters to overcome these hurdles.

Session 5: Leadership



André van Straten, author of *The Creative Revolution*, spoke about using creativity to unlock agility, resilience and innovation. “Creativity can be learned,” he said. “It is about having ideas but also recognising them, and solving problems. It can be your biggest competitive advantage and can help to future-proof your business.”

Human creativity combined with AI can be “the best of both worlds”, said van Straten. “AI is a game-changer – it’s a huge opportunity to augment human creativity.” His concept of the “Human Spark Engine” combines human traits such as intuition and imagination with AI’s speed and iteration power to drive impactful ideas. “Creativity always needs a trigger – without input, there is no output,” he said.

Van Straten, who hosted a pre-conference workshop for FINAT’s Young Professionals Network, also introduced the “WOW” method – Watch, Open, Work – for a structured approach to creativity: start with observation, then explore, incubate, and brainstorm.

Success by smallness

The closing keynote address came from mountaineer and adventurer **Bonita Norris**, the youngest British woman to climb Mount Everest and reach the North Pole. She recounted the inspirational story of her Mount Everest climb, where her mantras of “Success by smallness” and “Focus not fret” were key to helping her overcome her fears and achieve her goal. “Fear of failure can stop us from even starting. If you want to conquer the mountain out there, first you



need to conquer the mountain in your head,” she said. “We can’t control the avalanches; we can’t control the weather. We must focus on what we can control. Success by smallness helps us to be creative and keeps us from giving up – there is always one more thing you can do which might transform your chances. You must trust that those little insignificant steps that you are taking are helping to take you to the top. Focus on the process, and progress will look after itself.

“I wouldn’t have got to the top of that mountain were it not for the support of my team, particularly the leader of the group who was so supportive and encouraging. We must be that person – offering encouragement to the rest of our team.”

Collaboration



Philippe Voet, FINAT president, closed the conference by thanking the FINAT team, sponsors, speakers and delegates. “The three words that sum up the event are collaboration, action, and persistence,” he said. “Collaboration because we have seen how important it is that we work together. Action, because all this information we have received is nothing unless we take action. And persistence because we must keep going as an industry, one step at a time.”

FINAT managing director **Jules Lejeune** said: “It was fantastic to be back in Amsterdam – exactly ten years after we relaunched our annual congress as the European Label Forum. Since then, with just a brief Covid interruption, the ELF has grown into the meeting point for the label industry’s decision-makers and thought-leaders. It’s where insights are shared, ideas sparked, and the future of our sector shaped – from business trends and market shifts to regulation, sustainability, innovation, and creative leadership.

“This year was no exception. Much has changed in a decade, but the spirit of collaboration and community remains as strong as ever. And while the industry continues to consolidate, participation hasn’t dropped – in fact, with fewer companies, stable or (in the case of label converters) rising attendance feels like real growth.”

Next year’s FINAT European Label Forum will take place in Seville, Spain, on May 27-29.