

FINAT ELF 2026 highlights a sector shaped by AI, regulation and market change

This year's ELF showed practical applications of AI, while geopolitical tensions and regulatory pressures were cause for uncertainty. On behalf of FINAT, James Quirk reports.

The FINAT European Label Forum 2026 welcomed 254 people from 23 countries to sunny Seville on May 27-29 for the association's annual three-day conference and table-top exhibition. The attendance, up 6% on last year, included a 10% increase in converter delegates.



Artificial intelligence dominated the sessions, with a shift this year from its potential to real-world examples and strategies. Europe's place amid global geopolitical uncertainty was another key theme, while environmental sustainability and regulation were also heavily discussed.

A table-top exhibition featured 35 leading industry suppliers, including gold sponsors LOUPE/Labels & Labeling, Avery Dennison, Mark Andy, Rotocon and UPM.

During the event, FINAT announced the appointment of Dana Kilárska as the association's first female president, replacing the outgoing Philippe Voet. Vito Giurazza was named vice president. Voet and former president Chris Ellison were appointed Honorary Members in recognition of their exceptional service to the association and the wider label industry.

On the eve of the event, master of ceremonies Dr Vlad Sljapic unveiled the winners of FINAT's 46th annual Label Competition. The Best in Show award went to Multi-Color Corporation, Adelaide, Australia, for "Darma Rare Himalayan Blended Whisky". [Click here](#) for a full round-up of the winners.

Labels in a changing world

The keynote speaker was Dr Ilke Toygür, director of the IE Global Policy Center and professor of Geopolitics of Europe at IE University in Madrid, who outlined the forces reshaping Europe's business environment.



Major challenges facing the EU include insecurity, particularly since Russia's invasion of Ukraine, the cost-of-living crisis, and global transformation. "Europe is facing a seismic change increasingly defined by power – economic, technological, and military," she said. "The world is changing faster than our policies or institutions. The EU is learning the language of flexibility. This is not a moment of crisis, but of transformation."

Dr Toygür believes that the next decade will be the defining years of the European project, and professed optimism for its future. "I am optimistic for the EU, because there is no other way. Europe is filled with small countries, and small countries who don't know that they are small countries. No single nation on its own can face these challenges. The EU must work, because there is no alternative."



FINAT's Jules Lejeune presented the annual European self-adhesive label materials and consumption overview. In 2025, 7.37 bn sqm was consumed – a 2% increase on the previous year, but still at pre-Covid levels. Consumption of paper rolls increased by 0.9%, non-paper rolls by 4.1%, and sheets by 0.9%.

Over the past 20 years, the share of paper rolls in total labelstock demand has fallen from 73% to 67%; filmic roll label demand has risen from 20% to 30%; sheets have declined from 7% to 3%.

"White coated paper rolls remains the largest segment but is declining in share as the market in prepackaged goods matures in emerging regions," said Lejeune. "Consumption of direct thermal rolls, meanwhile, is booming thanks to growing online and self-service shopping, logistics and supply chain automation."

Catalina Steenbakkers of AWA summarised the latest FINAT RADAR findings. Preliminary findings of the FINAT RADAR converter survey show that revenue has largely either remained static or declined slightly in Q1 2026 compared to the same period last year. The most popular capital equipment purchase for the near future was finishing machinery at 31% – reflecting the shift towards added-value work.

Flexible packaging remains the most popular new market label converters are considering, at 32%, with folding carton second at 18%. Digitalisation and automation were cited by 40% of respondents as the most critical success factor for their business over the next three years.



Brand owners, meanwhile, are being affected by the geopolitical and trade environment, with 42% of respondents experiencing increased material and energy costs.



A panel moderated by Bert van Loon brought together AWA's Corey Reardon, Beatriz Suárez López of Studio MABA and the European Packaging and Design Association (EPDA), Informa Markets' Andy Thomas-Emans, and Simona Camilli of European brands association AIM, to discuss brand owners' priorities.

The first question tackled where opportunities lie for converters in helping brand owners regulate compliance. "There needs to be co-ownership between brand owners and converters of the trade-offs around sustainability," said Camilli. "Collaboration is needed not only between converter and brand owner, but also further back in the supply chain with, for example, the material supplier," said Reardon.

Regulation, innovation, technology



Diederik Samsom, a politician, strategist and entrepreneur for a sustainable future, who was a key architect behind the European Green Deal, offered an insider's view on where EU policy is headed. He highlighted three key trends: climate change, innovation, and the end of naivety. "Climate change is a trend, not a cycle. We are living in times of runaway climate change, right now," he said. But it is being met by a "mind-boggling" innovation curve.

A sustainability panel moderated by Bert van Loon brought together Stijn Billiet of MCC Label, Francesca Stevens of EUROPEN and FINAT's Pablo Englebienne. Billiet stressed the need for "stability and predictability" in regulation. "If regulation keeps changing, that's very difficult. We need to stay close to the regulatory process and be involved."

“The problem is not the Green Deal, it’s the ideology,” said Stevens. “The early drafts were interesting to say the least. The target numbers changed. Because of data, or science? No, because of ideology.”

Marius Tent and Aleš Krmela of CELAB-Europe spoke about the association’s liner recycling programme and urged delegates to get involved.



There was a notable shift in discussions about AI at this year’s ELF. Where previous talks highlighted future opportunities, Steve Metcalf of Imagine AI Live translated the most recent AI developments into practical opportunities for label converters today: such as increasing uptime, reducing waste, and enabling smarter and more connected workflows. “We’ve all used chatbots such as ChatGPT. But now we’re entering the era of AI agents: models that can plan and use tools,” he said. “Hiring AI agents is going to be a fundamental skill that can help your business.”

Carmen Lappí of Spanish converter Grupo Lappí, which runs six production plants across five sites in Spain and Portugal, revealed how the company took its first practical steps into implementing AI on its production floor. She quoted Microsoft, which says that most AI initiatives end up failing because they are led by IT departments rather than the board. “Start at the core, do it well, and then scale,” Lappí advised. “The visible AI will come later. Get the judgement right. The speed will come.”



A panel moderated by Bert van Loon featured Nanette Thomas of Synthogra, Iban Cid of Gemark, Marika Knorr of CCL Label, Jens Vor der Brueggen of Schreiner Group, and Martin Leitner of Durst Group to discuss drivers of innovation in the label industry.

Asked what the biggest innovation driver would be over the next three years, Thomas, Cid and Knorr all cited environmental sustainability. Vor de Brueggen pointed to “connecting digital products with the physical world”, while Leitner emphasised the importance of organisational structure. “Innovation comes from human ideas. We need to enable people.”

Delegates spent the evening enjoying local specialties in the elegant courtyard of historic Sevillian farmhouse Cortijo El Esparragal, while being serenaded by talented Flamenco musicians and dancers.



Skills, strategy and succession

The conference's second day kicked off with an AI breakfast workshop hosted by Steve Metcalf, who showed delegates how to build an AI agent from scratch for a real label converting use cases.

FINAT's Luc Lejeune summarised the lessons taken from the pre-conference Industry Roundtable discussions, before LOUPE Global's Jade Grace joined to discuss the changing industry landscape between last year's Labelexpo Europe and the first LOUPE Americas show in Chicago this September.

Peter Sasín, trainer and business owner of NLP Akademia, discussed three "mindset keys to thrive in turbulent times", based on his 20-plus years of work in high-performance psychology and neuro-linguistic programming: mastering focus, perception and inner dialogue.



A panel moderated by Bert van Loon and Alice Kosse of LOUPE (formerly Labelexpo) brought together Chris Ellison of OPM Labels & Packaging, Felix Neumann of Achertäler Druckerei, Stefanie Wareka of Marzek Etiketten+Packaging, Isidore Leiser of Stratus Packaging Group, and Will Parker of ParaNova Print & Packaging, to discuss how the packaging sector is evolving. The panel discussed the best ways to future-proof their business, with automation, innovation and human resources all cited.

In a powerful closing keynote, former Dutch Air Force pilot, behavioural psychologist and mediator Dominique Schreinemachers shared an extraordinary account of her helicopter being shot down in Afghanistan, which turned into a story of resilience and leadership. Incoming FINAT president Dana Kilárska closed the conference. “Growth is fragile and the market demands more from us than ever,” she said. “One key message from this week is that we simply cannot do it alone.”

Outgoing FINAT president Philippe Voet said: “ELF 2026 in Seville marked a turning point. Our industry is clearly moving from evolution to transformation. Across topics such as AI, sustainability, regulation and changing customer expectations, one message stood out: no company can navigate this complexity alone. The future of our industry will be built on collaboration, shared knowledge and bold leadership.”

FINAT managing director Jules Lejeune said: “Looking back at the European Label Forum 2026, I felt that our industry is entering a new phase: one in which strategic choices, collaboration and credible leadership matter more than ever. The discussions on market change, AI, sustainability, brand owner expectations and next-generation leadership all pointed in the same direction: success will not be achieved by individual companies alone, but by building stronger connections across the value chain.”



The next FINAT European Label Forum will take place in **Warsaw, Poland, on 19-21 May 2027**. The full extensive report can be found on the FINAT Members Area:
<https://www.finat.com/documents/1393/finat-elf2026-report-final.pdf>