Strategic Vision Statement

PMMI's Strategic Vision ...

is to convene packagers, processors and their supply chain partners to facilitate innovation, foster connections and develop business opportunities.

PMMI's Vision ...

is to be the leading global resource for the packaging and processing supply chain.

PMMI's Mission ...

is to improve and promote members’ abilities to succeed in a global marketplace.

2012 Priority Goals

Align PMMI Committees and the entire organization

with the goal of making PMMI and its trade shows more customer-centric.

Communicate the benefits

of PMMI’s customer-centric approach to PMMI members.

Identify opportunities and implement plans to increase direct involvement

with the customers of PMMI member companies.
Chairman’s & President’s Message

Dear Members:

On behalf of the Board and Staff of PMMI, thank you for another great year!

In the pages of this report, we’ll explore the successes of 2012 and the foundation for them: A solid strategic vision and a customer-centric approach to PACK EXPO and the rest of the PMMI businesses.

PMMI’s mission is to give our members tools to help them succeed in the global marketplace. Our vision and strategic vision bring the mission to life. Our vision is to be a resource for our members and their customers and partners, providing the tools they need for global success. PMMI’s Strategic Vision— that is, our modus operandi – is to bring the packaging and processing supply chain together, for networking, purchasing and understanding.

Obviously, PACK EXPO is one of the keys to achieving the goals set forth in our strategic vision, and we expanded our customer-centric approach in 2012, adding Beverage to our established vertical markets (Baking/Snack, Pharmaceutical/Medical Devices and Confectionery). Features including The Processing Zone and The Brand Zone further guaranteed attendees would efficiently find the suppliers they would need to see.

We also expanded membership to Mexico and announced the launch of EXPO PACK Guadalajara, to meet the needs of the many consumer goods manufacturers in western Mexico. With these developments, PMMI clearly represents the entire North American packaging and processing supply chain.

PMMI market research, business intelligence studies, international standards efforts and industry services all engage end users and manufacturers along the supply chain, bringing us together to lay the groundwork for growing our businesses and our industries. Each is an important function in its own right, and they also provide the foundation for our other initiatives’ success.

As you read this report, you’ll see how we put our strategic vision into action, and how it came to fruition — and benefited you — in 2012. We hope you find new ways to benefit from membership, and increase your involvement, in the coming year.

Nick Wilson
President, Morrison Container Handling Solutions
Chairman, PMMI; 2011-2012

Charles D. Yuska
President & CEO, PMMI
PMMI Board of Directors and committee members lead the association, from the 30,000-foot strategic planning perspective to committee-specific tactics and reviewing deliverables such as business intelligence reports.

Members say their committee experiences are among the best they have, as they work with — and get to know — peers with similar focus. Without the work of the Board of Directors and the committees, PMMI membership would be much less rewarding. To maximize your membership, get involved. Contact Andrew Dougherty, director of membership, for more information: adougherty@pmmi.org.

Business Intelligence Committee
Chairman: Jack Aguero, Pro Mach, Inc.
Richard Armstrong, Columbia Machine, Inc.
Dean Dalesandro, Videojet Technologies Inc.
Julie Deehr, SMC Corporation of America
John Eklund, Pro Mach, Inc.
Ginny Fox, 3M
Wayne Goldberg, Econocorp, Inc.
Jack Gray, Piab Inc.
Joseph Martin, Beckhoff Automation LLC
Barry Meyer, JLS Automation
Neil Nordling, Multifeeder Technology, Inc.
Marc Ostertag, B&R Industrial Automation Corp.
Leo Petrokonis, Rockwell Automation
Gary Saunders, Magnum Systems, Inc.
Michael Senske, Pearson Packaging Systems
Dan Sheba, Cone Drive
Alan Shuhairab, BellatRx Inc.

Education & Workforce Development Committee
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Patricia Andersen, Delkor Systems, Inc.
Peter Buczynsky, Pharmaworks Inc.
Shirley Chambers, Quadrel Labeling Systems
Rick Fox III, FOX IV Technologies, Inc.
Jacob Garvey, Garvey Corporation
Andy Hansbrough, Kollmorgen Corporation
Tom Jensen, Lenze Americas
Michelle Johnson, Pearson Packaging Systems
Timm Johnson, Spee-Dee Packaging Machinery, Inc.
Matt Jones, Dorner Mfg. Corp.
Mark Lovelace, Dyco, Inc.
Mitchell Machelski, Cone Drive
Patrick Mohan, Pro Mach, Inc.

Cezary Mroz, M-Tek Inc.
Robert Salone, e3controls
Steven Shoup, ITW Dynatec
Jeff Sullivan, Triple/S Dynamics, Inc.
Bob Trimpe, R.A Jones & Co. — Covington
Marc Wolf, B&R Industrial Automation Corp.

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Bernhard Barta, Blueprint Automation, Inc.
Montserrat Cerf, Polypack, Inc.
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Jo Anne Forman, Sealstrip Corporation
John Kowal, B&R Industrial Automation Corp.
Mark Nordling, Multifeeder Technology, Inc.
Katherine Putnam, Package Machinery Company, Inc.
Scott Reed, ADCO Manufacturing
Joan Cozzoli Rooney, Cozzoli Machine Company
Mark Ruberg, Pro Mach, Inc.
Ryan Schuelke, Enercon Industries Corporation
David Shepherd, Switchback Group
Scott Smith, Hartness International
Nikola Vajda, Marlen International
Pat Vincent, Arrowhead Systems, Inc.
Mike Wagner, Rockwell Automation
Chuck White, Econocorp, Inc.
Jeff Wierenga, R.A Jones & Co. — Davenport
Mike Wilcox, Delkor Systems, Inc.

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Dale Andersen, Delkor Systems, Inc.
Neil Anderson, PPM Technologies LLC
Brian Barco, Graco, Inc.
Erik Bronander, Modular Packaging Systems, Inc.
Ron Downing, George Gordon Associates, Inc.
Edward Gerri, Digital Design Inc.
Dana Greenly, Numatics
Edwin Howe, Enfield Technologies
Robert Kerr, Newmapak Ltd.
Neal Konstantin, PDC International Corporation
Dave Martin, Shibuya Hoppmann

Nick Osterholt Jr., Sidel Inc.
Frederick Pfleger, FP Developments, Inc.
Mark Reichert, A-B-C Packaging Machine Corp.
Chris Wilson, Morrison Container Handling Solutions

Show Committee
Committee Chairman: Bill Crist,
Kliklok-Woodman
Konie Brenneman, KRONES
Wilhelm Bronander III, Scandia Packaging Machinery Co.
Alana Brown, Bosch Packaging Technology, Inc.
Emmanuel Cerf, Polypack, Inc.
Glenn Edginton, All-Fill, Inc.
Kismet Fowler, Nordson Corporation
Bruce Larson, Pearson Packaging Systems
Rocky Marquis, MARQ Packaging Systems, Inc.
Mario Mazzotta, Standard-Knapp, Inc.
Zoran Momich, Z Automation Company
John Naunas, Shuttleworth, LLC
Thomas Riggins III, R.A Jones & Co — Davenport
Ole Rygh, Ryson International Inc.

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William Crist, Kliklok-Woodman
Sharron Gilbert, Septatech Group Inc.
Paul Irvine, Plexpack Corp.
John Kowal, B&R Industrial Automation Corp
Glen Long, ADCO Manufacturing
Bernard McPheeley, Hartness International
Dave Navin, Spee-Dee Packaging Machinery, Inc.
Rick Schneider, Schneider Packaging Equipment Co., Inc.
Bob Williams, Triangle Package Machinery Co.
Nancy Wilson, Morrison Container Handling Solutions
2012 Board of Directors & Leadership

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Morrison Container Handling Solutions

VICE CHAIRMAN
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IMMEDIATE PAST CHAIRMAN
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Omega Design Corporation

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Emmanuel Cerf
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Bill Crist
Kliklok-Woodman

Ben Garvey
Garvey Corporation

Sharron Gilbert
Septimatech Group Inc.

Timm Johnson
Spee-Dee Packaging Machinery, Inc.

John Kowal
B&R Industrial Automation Corp.

Rocky Marquis
MARQ Packaging Systems Inc.

Tim McCarthy
Kinsley Inc.

Mark Reichert
A-B-C Packaging Machine Corp.

Rick Schneider
Schneider Packaging Equipment Co., Inc.

Michael Senske
Pearson Packaging Systems

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Pearson Packaging Systems
Administration Builds the Infrastructure

The Administration Department provides the infrastructure for PMMI operations — services such as maintaining PMMI’s member and trade show websites; maintaining the association management software system (AMS) that provides critical data and analytics for PMMI’s programs and services; managing information technology services and addressing all human resource needs.

Highlights of 2012:

- Database integration with the trade show registration system allows more immediate access to attendee data.
- Database integration with the email deployment service is helping to refine e-mail distribution.
- IT infrastructure upgrades enhanced the security of the PMMI network, improve its functionality and boost productivity.
- Implemented payment processing technologies that give members and other customers the ability to pay PMMI invoices online.
- The Administration Department provided the technical expertise to launch PMT en Español, an online, Spanish-language version of PMT Magazine.

Communications: The Buzz Starts Here

The benefits of the customer-centric approach were a constant focus of communications to the PMMI membership and the industry as a whole. Roughly a third of press releases focused on the customer-centric features and philosophy of PACK EXPO. (The balance spoke to member news and business intelligence results, among other topics.) Communications also used Chairman’s Reports at the 2012 Executive Leadership Conference and Annual Meeting; and four of the monthly Chairman’s Corner columns in PMMI Reports to communicate the customer-centric message to members.

But naturally, communications efforts went beyond a single initiative. The Communications Department orchestrated the Twitter boards at PACK EXPO International 2012, giving the community of exhibitors and attendees another way to communicate with each other and talk about the massive show. The PACK EXPO Buzz booth provided more opportunity to get involved with PACK EXPO and PMMI social media efforts, including the PACK EXPO Connected Communities.

Other deliverables for the year included a brochure and video explaining PMMI’s new strategic vision, and presentations at MarketTrends, joint committee meetings and PACK EXPO’s Exhibitor University. PMMI reached out to press all year long, with feature articles, press releases and columns focusing on topics that included, but were not limited to, business intelligence research, developments in Education & Workforce Development, findings from the Alliance for Innovation & Operational Excellence.

By facilitating appearances at industry events and media interviews, and driving social media efforts, the communications group also strengthens the work of the association as a whole, promoting PACK EXPO programs, features, sponsors and news; supporting Business Intelligence research reports; and publicizing the meetings and other products to support members’ success and growth in the global marketplace.
2012 Finishing Better than Budget

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PMMI projects 2012 net assets from operations for 2012 will total $4.7 million, a 44 percent improvement over budget.

PMMI Meetings: Relevance, Networking, Vision

PMMI members are accustomed to excellent speakers, relevant and insightful data, and exceptional networking opportunities at member meetings, but 2012 raised that bar even higher with higher-profile speakers and a single theme for the Executive Leadership Conference (ELC) and Annual Meeting. “Waves of Change, Oceans of Opportunity” was a topic too important, with too much depth, to limit to a single event. Moving forward, PMMI will continue the practice of having one theme for both meetings.

The meetings covered a range of thought-provoking topics that, in combination with exceptional networking opportunities, will compel members to return year after year:

- Global change factors
- End user perspectives
- The Food Safety Modernization Act
- Supply chain issues
- Economic Outlooks
- Cloud Computing
- QR Codes
- “Shirtsleeve sessions” for small-group discussions and networking
2012 Executive Leadership Conference

Speakers focused on topics that make a difference in doing business. For example, General Mills’ Engineering VP, Gregg Stedronsky, discussed what General Mills needs from its suppliers; futurist Erik Peterson, A.T. Kearney, provided a peek into how water supply and population growth trends will impact the world in which we live and do business; and food safety expert David Acheson, MD, Leavitt Partners, (formerly of the U.S. Food & Drug Administration) updated members on the Food Safety Modernization Act and its impacts on PMMI members. Rounding out the experience were shirtsleeve sessions and events that brought members together in an atmosphere designed to foster candid conversations and strengthen business and personal networks.

2012 MarketTrends Roundtable

A member advisory group assisted with program development, speaker selection and promotion. The collaboration generated a program tailored to specific needs, and not surprisingly, developments in food safety and the Food Safety Modernization Act were high on the agenda. Jeff Barach, Ph.D. (shown), a food safety consultant to PMMI, led a discussion on the legislation that is changing how members and their customers do business and making a difference in machinery design.

2012 Safety Conference


Top to Top Summit

At the April Top to Top Summit, PMMI members and executives from end user companies participated in panel discussions to share perspectives and discuss opportunities to collaborate in three primary areas: packaging operations (training, service/maintenance, machinery attributes), product safety regulations (product security, tamper-proof packaging, the Food Safety Modernization Act), and globalization (markets, strategies, production issues).

2012 Annual Meeting

The highlight of any Annual Meeting is a tour of the host member company’s plant, and the 2012 Annual Meeting was no exception. Members got a shop-floor look at Pearson Packaging Systems’ operations in addition to a line up of speakers that included a 2013 outlook from economist Alan Beaulieu of ITR; Richard Hawley of AT&T on cloud computing; and Dave Dandel of Evergreen Pacific Partners about investing in technologies. The now-annual Technology Test Drive sessions brought new technologies to life, and even gave attendees a glimpse of the future of engineering with an exhibit from the FIRST Robotics team sponsored by Pearson Packaging Systems.
PMMI Membership Tops 600

Representing All of North America ...

In June, PMMI announced three significant steps toward aligning our membership makeup with NAFTA, bolstering EXPO PACK México and strengthening connections between members and customers:

We announced the newest PACK EXPO trade show: EXPO PACK Guadalajara, opening in February 2013. As a major hub for manufacturing, particularly in the food and beverage sectors, Guadalajara and the surrounding area deliver a critical attendee base.

PMMI members voted to expand the General Membership category to include qualified Mexican manufacturers.

PMT en Español launched. This online, Spanish-language companion to PMT Magazine, provides a digital presence that will benefit Mexican and Latin American customers and advertisers.

Membership Snapshot

In 2012, PMMI members opened general membership to OEMs manufacturing in Mexico. With this expansion, PMMI now represents the packaging and processing supply chain throughout North America.

PMMI grew by 33 members over the course of the year, bringing our membership to 615 member companies.

The Entire Packaging & Processing Supply Chain

Just as our members’ businesses must be solutions focused, so must PMMI. To achieve this goal, PMMI must continue to expand its focus beyond packaging machinery, representing the entire packaging and processing supply chain. to embrace a range of companies as core members or key constituents.

Case in Point: PMMI Supplier Members in 2012 came together to form the Suppliers Council, with the intention of increasing their collective contributions to PMMI. The 10 founding members held its meeting of the Suppliers Council during the 2012 Annual Meeting in Spokane, Wash. Over the coming year, the group will formalize its mission and plan.
Mid-Year Sell Out

PACK EXPO International 2012 sold out mid-year, and recorded 1.1 million net square feet and 1,965 exhibiting companies. Attendance patterns held consistent with years past. It was, by all measures, the strongest edition of PACK EXPO International since 2006.

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Buyers from Around the World

PMMI/PACK EXPO’s partnership with the U.S. Department of Commerce’s International Buyer Program (IBP) is key to attracting international buying delegations to PACK EXPO shows. On site, the International Business Center plays customer-centric host, providing services such as assistance in locating machinery, welcome briefings, interpretation services and private meeting space.

International attendance at PACK EXPO International 2012 was up 8 percent over 2010, with 6,868 attendees visiting from more than 130 countries. Among them were international buying delegations from countries including Argentina, Brazil, Canada, Central America, China, Colombia, Japan, Mexico, Peru, Russia and Thailand.

In addition to the partnership with IBP (now spanning more than 20 years), PMMI offices in Latin America (Mexico City) and China (Shanghai) set new standards for helping members and customers connect in 2012. The ongoing initiative involved strengthening relationships with international end user associations – just as with domestic associations – to promote their members’ participation at PACK EXPO shows. Special emphasis was placed on cultivating relationships and delegations from within the vertical markets PACK EXPO emphasized.

PACK EXPO Votes for Carville & Miller

For the second entry in the PACK EXPO Lecture Series, we welcomed two well-known political voices: James Carville, one-time advisor to President Bill Clinton, and comedian and radio personality Dennis Miller. Chicago TV journalist Bob Sirott navigated the pre-election bipartisan waters with ease, leaving audience members with plenty of food for thought.
PACK EXPO’s customer-centric strategy means honing in on what attendees need, leading them to the answers they seek — answers provided, of course, by the exhibitors. And at PACK EXPO International 2012, attendees saw the customer-centric strategy at work from the time registration opened until they left Chicago: Show floor pavilions, special features for targeted vertical markets, market-specific networking events, mobile apps to plan time on the floor and strategic industry association partnerships that added considerable value to the groups’ members on the show floor and in The Conference at PACK EXPO.

Attendees had more chances than ever to delve deep into their specific industries as PACK EXPO expanded its customer-centric approach. The show featured five pavilions of exhibitors serving specific markets: The Processing Zone, The Pharmaceutical Pavilion, The Reusable Packaging Pavilion, The Confectionery Pavilion and The Brand Zone. That structure, in concert with My PACK EXPO, the PACK EXPO app, keyword searches on Packexpo.com and the Pre-Selects printed guides to exhibitors in various categories, made navigating PACK EXPO easier and more efficient. It brought the customer-centric philosophy to life.

Using a touch screen kiosk with enhanced listings and video, PACK EXPO assisted attendees in their search for pharmaceutical technology solutions. The pilot program provided additional exposure for those exhibitors whose booths were outside The Pharmaceutical Pavilion.

Educational opportunities on the show floor improved, too. This included creating a single, larger Innovation Stage theatre. The effort put exhibitor innovations front and center on the Grand Concourse.

Networking-oriented show floor lounges expanded from their 2012 debut in Las Vegas — PACK EXPO International 2012 introduced The Beverage Cooler lounge and reprised The Candy Bar lounge, The Rx Lounge and The Baking-Snack Break lounge. A visit to a vertical lounge meant connecting with attendees and exhibitors in the same market and access to an “Ask the Expert” feature staffed by leaders from partner trade associations. Receptions held at the close of Day Two (Oct. 29) amplified the available networking opportunities.

The success of the lounges resulted largely from partnerships like these, with leading trade associations, and sponsorships from exhibiting companies. By working with our partners, we were able to directly address their members’ and customers’ needs.

The customer-centric approach has boosted sales for PACK EXPO Las Vegas 2013, too. By Oct. 31, the last day of the Chicago show, space sales for 2013 exceeded year-to-date sales for 2012 by 20 percent. And, by mid-December, The Brand Zone at PACK EXPO Las Vegas 2013 was nearing capacity.
Introducing EXPO PACK Guadalajara

Based on the continuing success of EXPO PACK México, requests from EXPO PACK México exhibitors and market research conducted by PMMI’s Mexico City staff, PMMI introduced EXPO PACK Guadalajara.

The newest trade show in the PACK EXPO family debuted Feb. 27–March 1, 2013, at EXPO Guadalajara (Guadalajara, Jalisco, Mexico), and well exceeded its inaugural year goals of more than 200 exhibitors and over 3,000 net square meters, and 3,000 attendees, preliminary figures show.

This major Mexican city is the capital of Jalisco and one of the largest urban centers in North America. As a manufacturing hub, Guadalajara ranks third in generating GDP among Mexican cities. Jalisco’s food industry provides 12 percent of Mexico’s overall food production, generates over 120,000 direct job opportunities and places third in exports. Together it means an attendee base that needs access to the best technology to pack, protect and guarantee product quality.

And it has industry support: The range of organizations represents a large portion of the attendee base, end users in the food processing, cosmetics, package design and packaging fields. As of December, the following end user associations had lent their support to the show:

- ABRE (Innovation Center for Packaging Design)
- AMEE (the Mexican Packaging Association)
- CANAGRAF (National Chamber of the Graphic Arts Industry)
- CANAINCA (the Mexican Chamber of Processed Foods)
- CANIPEC (the Mexican Chamber for the Cosmetics Industry)
- CIAJ (Food Industry Chamber of Jalisco)
- CANACO Guadalajara (Guadalajara Chamber of Commerce)
- CAREINTRA (Manufacturing Industry Chamber of Jalisco)
- CICEJ (Footwear Industry Chamber of the State of Jalisco).
Mexico is an important, rapidly-expanding market, and the growth of EXPO PACK México reflected its increasing importance. The show welcomed 25,139 attendees and 1,015 exhibiting companies to its largest show floor to date — 18,475 net square meters (198,800 net square feet), a 13 percent increase over 2011. Attendees and exhibitors visited from more than 32 nations, and the diversity seen clearly in the nine international pavilions, which represented Argentina, Brazil, Canada, China, France, Peru, Spain, Taiwan and the United States.

PMMI saw major growth in member participation at EXPO PACK México: EXPO PACK México 2012 hosted 178 PMMI member exhibitors, 35 percent more than 2011, and the PMMI member pavilion grew 7 percent to 1,572 square meters (16,900 square feet).

Partnerships Demonstrate Value

EXPO PACK’s partnerships with leading industry organizations promoted attendance at the show, and organized delegations of attendees: AGEXPORT (Guatemala), ANPDAPAC (Mexican Bottled Water Association), CAINTRA Monterrey (Chamber of Manufacturing Industry), CANACINTRA (National Chamber of Industry) from León, Queretaro and Puebla; CANAINCA (Mexican Association of Processed Foods), CANIFARMA (Mexican Pharmaceutical Association), CANIPEC (Mexican Chamber of Perfumes, Cosmetics & Toiletries), CAREINTRA (Chamber of Industry for the State of Jalisco), PROCOMER (Costa Rica), PROMPERÚ (Comisión de Promoción para la Exportación y el Turismo).

PROCESA Pavilion, Pharmaceutical Pavilion & Strength in Sustainability

Larger companies attending EXPO PACK México sought out ideas for greater productivity and efficiency. Smaller, local companies came, too, often looking for new products and ways to develop them. And no matter the vertical market, there were solutions available.

The PROCESA Pavilion at EXPO PACK México was the starting point for visitors looking for resources to proactively address trends and changes in the processed food marketplace in Mexico and Latin America. Now in its second year, the PROCESA Pavilion doubled in size from 2011, with more than 2,000 net square meters (21,530 net square feet) in 2012.

The Pharmaceutical Pavilion also returned this year, growing by 19 percent to 1,346 net square meters (14,490 net square feet), with 49 companies exhibiting products and services for the pharmaceutical industry.

More than 100 exhibitors participated in the EXPO PACK Verde program, which identifies companies providing sustainable solutions or employing sustainable practices, and the Mexican Packaging Association (AMEE) dedicated a full day of its Packaging Week conference, produced in conjunction with EXPO PACK México, to sustainability. Additional sessions covered new technologies, trends and package security.
ProPak China (July 18–20, 2012; Shanghai) is an excellent example of how PMMI supports its members at international trade shows. PMMI hosted a pavilion and special events to raise the profile of members and help them make the connections needed for success in China. PMMI utilized ProPak China’s show daily to actively promote members on site, and distributed a guide, in Chinese, to PMMI members’ booths.

A total of 36 PMMI members exhibited at the show, including 16 members in PMMI’s North America pavilion. Pavilion exhibitors received assistance with stand set-up and decoration, access to interpreters, meeting rooms, lounge areas and help setting up meetings with potential customers and sales partners.

A business roundtable dinner and end user matchmaking event delivered additional business insight and opportunities. 30 members attended the roundtable, and 12 took advantage of the matchmaking event.

Worldwide Connections
Additional business development programming and outreach to international associations and during key international trade shows, creates meaningful member-customer connections all year long:

### China
- China Bakery Association (includes Ice Cream Association, Biscuit Association and Confectionery Associations)
- China Beverage Industry Association
- China Dairy Industry Association
- China Alcoholic Drink Industry Association (China Wine Association, China Yellow Rice Wine Association, China Liquor Association)
- China Meat Industry Association
- Shanghai Food Industry Association
- ISPE China (China Pharmaceutical Industry)

### Latin America
- AFMAC (The Mexican Pharmaceutical Association)
- AGEXPORT (The Export Association of Guatemala)
- ANDAPAC (Bottled Water Association, Mexico)
- CAMARSAL (Commercial Chamber of El Salvador)
- CANAINCA (Food Processing, Mexico)
- CANIFARMA (the Pharmaceutical Chamber in Mexico)
- CANIPEC (The Cosmetic Chamber of Mexico)
- CONMEXICO (The Associations of Consumer Goods)
- PROCOMER (Costa Rica Commercial Services)
Globally Customer Centric

PMMI Provides Global Member Support & Key International Resources

To support members and their customers on the international stage, PMMI must have a global scope and presence that reveals innovations in packaging, processing and related technologies from virtually anywhere in the world. And we do.

Globalization’s impact is unavoidable, whether you’re an exporter or not. Economic conditions and trends from around the world affect growth in all the industries PMMI members serve. And it’s not a stretch to say customers now evaluate their suppliers against a field of global competitors. Whether you sell domestically or internationally, you function in a global marketplace.

Finding Agents and Representatives

PMMI’s database of over 1,200 overseas and domestic agents & distributors continues to provide members the most comprehensive directory of sales partners in the industry. Furthermore, PMMI continues to sponsor agent matchmaking services at key industry tradeshows such as PACK EXPO International, EXPO PACK México and Fispal Tecnología (Brazil) to help members establish and strengthen their presence in global markets. Last year at PACK EXPO International, more than 40 members and 50 international agents participated in over 120 pre-arranged meetings.

International Trade Show Support

PMMI’s presence in the global marketplace was highlighted by organizing pavilions and promoting member companies at international trade shows: EXPO PACK México (Mexico City); Fispal Tecnología (São Paulo, Brazil); Sino-Pack (Guangzhou, China); ProPak China (Shanghai); CDIA Dairy Show (Hangzhou, China); CIPM Pharma (Shenyang, China); CBB China Brew & Beverage (Beijing); and ProPak Asia (Bangkok, Thailand).

After more than 20 years, it’s clear that PMMI and the U.S. Commercial Service’s International Buyer Program have a good thing going. The relationship has brought hundreds of delegations of buyers to PACK EXPO from around the world, helping establish the connections that make PMMI members leading exporters and establish PACK EXPO as the leading packaging and processing trade show.
Understand Your Markets

Economic Outlook Reports

*Member Price: Free*

- Quarterly Economic Outlook
- Monthly Economic Indicators

Benchmarking Studies

*Member Price: $0–$1,500*

- Shipments Study (Free to participating General Members, $1,500 to non-participating members)
- Sales & Marketing Practices (Free, but only available to participants)
- Quarterly Purchasing Index (Free to members)
- Key Attributes Study (Free to members)

International Market Research

*Member Price: Free*

- India
- Western Mexico
- China
- Global Packaging Trends

Industry Reports

*Member Price: Free*

- Bakery & Snack Market Assessment
- Pharmaceutical & Medical Devices Market Assessment
- Nutraceutical Market Assessment
- Service Issues and Expectations
- Trends in Labeling
Buying machinery is only one part of a packaging answer, and PMMI’s business intelligence research supports members as they develop the total systems solutions their customers need. These studies, which help members to understand the business environment, the challenges their customers face and the solutions they’ll need, are developed under the guidance of the Business Intelligence Committee. PMMI members have the advantage of being able to access most of these studies at no charge — a $25,000 value.

**Benchmarking:** The annual Shipments Study describes the state of the packaging machinery industry. Employing a new methodology that increased the quality of the data, the 2012 report was built on input from 187 General Members, making it the largest Shipments Study in recent years. PMMI’s Key Attributes study describes just what end users want and expect from their suppliers.

**Economic Outlook:** Quarterly Economic Outlooks and Monthly Economic Indicator Reports keep members’ fingers on the pulse of the economy, and Quarterly Purchasing Indexes shed light on how the economic picture is impacting members’ customers. Over the course of the year, 459 end users responded to the Quarterly Purchasing Index Survey at least once. Also in 2012, PMMI published its first Global Packaging Trends Report, which set the scene for developments in packaging needs around the world.

**Industry Reports & Quickie Surveys:** PMMI’s Industry Reports covered some of the vertical markets targeted at PACK EXPO International, and called on end users to review the veracity of the results. Not only did that tactic yield better research reports, but it also brought influential end users into close communication with PMMI. In 2012, PMMI conducted 10 Quickie Surveys on behalf of members.

**International Research and Education**

Global Marketing and Business Intelligence initiatives coincided in 2012 as PMMI strengthened its international research and education programs. The focus was on identifying opportunities and strategies in key international markets that included India, Western Mexico and China. In addition to market research, conferences, workshops and webinars conducted throughout the year allowed members and consultants to share success stories and best practices.

**Vision 2020**

Under the guidance of the Business Intelligence Committee, PMMI again conducted Vision 2020 focus groups at PACK EXPO International 2012. Nearly 60 executives from consumer packaged goods companies participated in the discussions, designed to elicit their predictions and opinions of the state of packaging in their businesses and industries. Of the six sessions, four paralleled PACK EXPO’s vertical markets.

PMMI’s report on the focus group discussions outlined 10 trends the participants brought up and other points of interest that arose in the conversations. The results informed discussions when PMMI leaders and their customers came together at the 2013 Top to Top conference.
Packaging Hall of Fame 2012

In 2012, we inducted one of the largest groups in recent memory to The Packaging Hall of Fame Class (L-R): Curtis Babb, MillerCoors (retired); Thomas Brady, Plastic Technologies, Inc. (PTI); Nick Wilson, Morrison Container Handling Solutions.; Thomas Dunn, Flexpacknology LLC; Fred Hayes, Hayes & Associates Inc.; Bernie Lerner and Hershey Lerner, Automated Packaging Systems

Education at PACK EXPO Magnifies Customer-Centric Thinking

The Conference at PACK EXPO, sponsored by DuPont, also took a customer-centric approach. Working in partnership with other organizations, we provided programming that distinctly met end user needs. Our partners – the Alliance for Innovation and Operational Excellence (AIOE); Association for Automatic Identification and Mobility (AIM); the Institute of Packaging Professionals (IoPP); the Great Lakes and Midwest chapters of the International Society for Pharmaceutical Engineering (ISPE); the International Society of Beverage Technologists (ISBT); PMMI U; Reusable Packaging Association (RPA) and The Packaging Association—PAC — created the conference sessions under the umbrella theme, “Educate, Innovate, Advance.” The arrangement provided opportunities to bring in speakers from large CPGs, adding credibility and name-recognition to the program.

Conference tracks paralleled the other customer-centric features of the show: Beverage; Focus on the Future – Trends and Innovations; Food Safety/Product Security; Manufacturing Solutions; Pharmaceutical and Medical Device; Sustainability/Packaging Materials; Track and Trace; and Transportation and Logistics.

MarketTrends

The MarketTrends Roundtable was held at the Chicago Marriott O’Hare Hotel, May 15-16, 2012. There were 79 attendees, 15 speakers, 6 panelists and 3 sponsors (Lenze Americas, B&R Industrial Automation and Kollmorgen Corporation). Staff of the PMMI Education and Workforce Development Department worked with an Advisory Group for this meeting to assist with program development, speaker selection and promotion. This collaboration helped make this Conference the most well attended MarketTrends Roundtable since 2008.

Safety Conference

Under the umbrella “Meeting Global Requirements – CE and Beyond,” the 2012 Safety Conference was inspired by the “Declaration of Conformity” required to sell equipment in the European Union, explaining the relevance of those issues within the domestic marketplace as well as when exporting. The program focused on global standards and CE Mark. There were 35 attendees, 6 speakers, and 2 sponsors (B&R Industrial Automation and Lenze Americas). The Safety Conference has gone “paper free” in recent years, and all handouts and slides are provided on flash drives.
Supplies Knowledge & Know-How

Customer-centric Approaches to Workforce Development

Sophisticated packaging machinery and processing equipment systems are enhancing productivity, strengthening diagnostics, improving maintenance. They’re creating efficient, more sustainable, solutions. But they’re also creating new challenges in the hiring process. Employers must find and keep a workforce with skill sets including, but not limited to, problem-solving, mechanical knowledge and electrical capabilities. PMMI’s Education & Workforce department creates the tools members and their customers need to meet that challenge.

e-Learning

In 2012, e-Learning offerings engaged end users with high-quality technical education. More than 140 companies, including Clorox, Glad Manufacturing, Wrigley, the Wine Group and Procter & Gamble, purchased 446 courses in all. (P&G purchased an unlimited annual license and uploaded PMMI courses to its corporate learning management system.)

Mechatronics

In October, PMMI rolled out two new Mechatronics Certificates at PACK EX-PO. These online evaluations enable end users and PMMI members to identify the qualified, skilled talent they need for technical positions in packaging and processing.

Then, in 2012, PMMI partnered with the Manufacturing Institute and the Industrial Maintenance Training Center of Pennsylvania (IMTC) in an alliance that brings 10 community colleges and technical schools in Pennsylvania into alignment with the requirements of PMMI’s mechatronics certificates.

The partnership — which will be replicated in coming years — is just the latest acknowledgement of the relevance of PMMI’s Mechatronics Certificates to manufacturing.

PMMI Certified Trainer & Blended Learning

PMMI’s Certified Trainer program welcomed 81 new trainers from 33 companies, with a total 398 trainers on the rolls by year-end 2012. Recognizing that adults learn most effectively across a variety of platforms, and at the request of end users, PMMI added a Blended Learning course in 2012. Its goal is to teach participants (members and end users) how to incorporate our e-learning components with traditional training mechanisms. The sessions model the blended learning approach with a live webinar, pre-webinar assignments and follow-up one-on-one coaching with the instructors. The first blended learning session, conducted in November, sold out.
Showing Future Leaders Where to See the Future

PMMI is firmly committed to fostering students' interest in packaging and processing careers. To support that commitment, the PMMI Education and Training Foundation provides scholarships each year to help students and instructors from PMMI Partner Schools travel to PACK EXPO. In 2012, the PMMI Education and Training Foundation provided PACK EXPO travel scholarships to 170 students and instructors from 19 partner schools. PMMI partner schools also receive booth space in the Education & Workforce Development Pavilion, courtesy of PACK EXPO.

Experiencing PACK EXPO provides the best possible overview of the world of packaging and processing, and to make sure they see as much as possible, PMMI volunteers and staff engage the student and show tours led by PMMI past chairmen gave students the benefit of the industry veterans' first-hand knowledge.

But probably most well received of all are the contests, arranged by PMMI and supported by members and exhibitors, that engage students' competitive natures, spark their imaginations and replenish their enthusiasm for this industry. These include The Amazing Packaging Race and PMMI's Student Packaging Contest. ASCO Numatics sponsored the 2012 Amazing Packaging Race, and B&R Industrial Automation sponsored The Student Packaging Contest.

PMMI Partner Schools

PMMI recognizes and supports academic and technical institutions providing quality education and training opportunities in the area of packaging machinery. The network we create encourages interaction and cooperation among educational institutions, PMMI and companies that employ packaging machinery mechanics and technicians. Over two dozen two- and four-year colleges are PMMI partner schools.

- Alexandria Technical College
- California Polytechnic State University
- Central Community College — Columbus
- Clemson University Department of Packaging Science
- Conestoga College
- Dabney S. Lancaster Community College
- Dunwoody College of Technology
- Eastfield College
- Greenville Technical College
- Hennepin Technical College
- Indiana State University
- Lake Washington Technical College
- Michigan State University
- Missouri University of Science & Technology
- Mohawk College
- PTEC - Clearwater
- Purdue University — Calumet
- Reading Area Community College
- Rochester Institute of Technology
- Rutgers University
- San Jose State University
- University of Cincinnati
- University of Florida – Gainesville
- University of Illinois at Urbana
- University of Nebraska – Lincoln
- University of Wisconsin-Stout
- Virginia Tech
- Wisconsin Indianhead Technical College

Foundation Distributes $100,000 for Education

The PMMI Education & Training Foundation supported tuition reimbursement for 43 employees from 25 companies, and distributed close to $20,500 in funds in 2012.

Through the Foundation's various scholarship and grant programs, PMMI offered nearly $75,000 in scholarships to students at these PMMI Partner Schools: Alexandria Technical College; Central Community College – Columbus (Neb.); Conestoga College; Dunwoody College of Technology; Greenville Technical College; Hennepin Technical College; Pinellas Technical Education Centers (PTEC); Purdue University – Calumet; Reading Area Community College; Wisconsin Indianhead Technical College.
Today’s Lesson: How Packaging Works

B&R Industrial Automation sponsored the fourth annual PMMI Student Packaging Contest, which challenged students to come up with a food-safety compliant weighing, bagging and case-packing solution for a fictional snack food manufacturer. In their quest, the students experienced the strength of PACK EXPO, researching solutions and interacting with leading manufacturers.

Marc Ostertag, CEO of sponsor B&R (back row), made the award presentations. First place ($4,000 in scholarship funds, shared among team members) went to the University of Florida team—students Gaby Cruz, Colleen Delaney, Michael Grandinetti and Alex Tipton (Dr. Bruce Welt, advisor). The University of Wisconsin—Stout team received second place, sharing $2,000 in scholarship funds, as third-place winner, Cal Poly State University, shares $1,000 in scholarship funds. The other participating schools were Purdue University at Calumet; Rutgers University; San Jose State University; and Conestoga College.

Race for Success

ASCO Numatics sponsored The Amazing Packaging Race for the second year. The light-hearted event sent student teams to the four corners of the exposition to earn points by completing challenge tasks at any of the nearly 30 participating exhibitors. Teams were assigned without regard to school affiliation, providing an opportunity to network with peers from other programs and each member of the winning “hot pink” team (Alexandra Hills, Rochester Institute of Technology; Florin Mustata, Purdue University—Calumet; Stephen Suba, San Jose State University, and Dillon Quist, Wisconsin Indianhead Technical College) received an Apple iPad.

High School Teams Come in FIRST

Massman Automation Designs LLC and Siemens sponsored the “Future Innovators — Robotics Showcase,” which introduced high school robotics teams from the 2012 FIRST Robotics competition to PACK EXPO. Each team used the Showcase area to demonstrate the robots they had entered in the annual FIRST competition. This PACK EXPO “first,” launched a PMMI initiative to expose high school students to packaging and processing as potential career choices.

Dorner Mfg., Flexicell, the Packaging Machinery Manufacturers Consortium (Aagard, Douglas, ITW Heartland and Massman) and Pearson Packaging Systems each sponsored student teams from their local areas.
PMT Turns 9

*PMT Magazine*, published by PMMI, is a bi-monthly publication addressing technology and operations needs of packaging and processing operations professionals. The well-respected publication, launched at PACK EXPO 2003, celebrated its ninth anniversary in 2012. Today, *PMT* reaches 35,000 audited subscribers, plus an additional 12,000 who receive the PMT Express e-newsletter.

In 2012, the PMT team, supported by PMMI web services, developed *PMT en Español*, a Spanish-language e-newsletter using *PMT* content. Distribution to 13,000 consumer packaged goods professionals launched in June, providing useful information to customers of PMMI’s Latin America office in Mexico City.

Navigating the Food Safety Modernization Act

For roughly two years, PMMI members and their customers have prepared for new food safety rules being ushered in by the 2011 Food Safety Modernization Act (FSMA). In 2012, PMMI engaged food scientist Jeff Barach, Ph.D., to support PMMI members in understanding and implementing FSMA. Under the arrangement, Barach works directly with members at their request, and represents PMMI in presentations and media appearances.

Connecting with Customers and Keeping Members Informed

Keeping members up-to-date means staying involved with the industry groups with which members affiliate. PMMI actively participates in several groups to keep members abreast of major developments in areas of interest.

The Organization for Machine Automation and Control

The Organization for Machine Automation and Control (OMAC) turned to PMMI for staff support in 2011. Since then, finances for the decade-old group have stabilized, and OMAC Packaging Workgroups (OPWs) have experienced re-energized member participation.

International Society of Pharmaceutical Engineers

In support of the customer-centric structure of PACK EXPO International, AIOE arranged for the Great Lakes and Midwest Chapters of International Society of Pharmaceutical Engineers (ISPE) to participate in the Conference at PACK EXPO and support The Rx Lounge in The Pharmaceutical Pavilion. AIOE is also working with the ISPE International Leadership Forum, a group of senior pharmaceutical manufacturing executives that discusses supply chain concerns with other market segments.

AMERIPEN

Launched in early 2011, this group of CPG firms and suppliers advocates and educates on packaging issues related to legislation and regulations. PMMI is a non-voting member of AMERIPEN’s Technical Advisory Group.

Packaging Management Council

Now in its 11th year of support by PMMI, the Packaging Management Council (PMC) meets twice per year and brings together dozens of packaging design executives to discuss issues affecting their packages and packaging operations. Topics in 2012 included workforce training and engagement, innovation, package design and label version control, plus a tour of a PMC member facility. The PMC also added five new members to its roster.
the Supply Chain

AIOE Addresses Common Issues

The Alliance for Innovation and Operational Excellence (AIOE), which launched in early 2011, brings together CPG manufacturing, engineering and operations professionals to develop guidance to address non-proprietary production challenges. This industry collaboration is resulting in a series of recommendations, delivered through white papers and webinars, that are available to the entire supply chain. Solutions suppliers also actively participate so that these industry ideas can gain broader acceptance and implementation. The group’s focus areas to date include workforce development, overall equipment effectiveness, sustainability, product safety and engineering, and more will be added as needs are identified.

In 2012, more than 95 CPG executives, representing over 75 firms, contributed their expertise to projects such as these:

The Alliance hosted a six-session Conference at PACK EXPO track.

AIOE’s founding Share Groups — Operational Reliability, Manufacturing Excellence, Sustainability and Product Safety — released reports on their respective areas of study:

- “Developing & Engaging the Manufacturing Workforce” (Manufacturing Excellence)
- “Overall Equipment Effectiveness (OEE)” (Operational Reliability Solutions)
- “Journey to Sustainability” (Sustainability Solutions)
- “Validating the Reduction in Salmonella and other Pathogens in Heat Processed Low-Moisture Foods” (Product Safety Solutions)

The newest share group, Engineering, launched late in 2012. One of its first tasks is to consider equipment design templates and recommend how CPG firms and PMMI members can use them. And that, in a nutshell, is the purpose behind AIOE — the Alliance is a way to bring PMMI members and customers together so PMMI members can better serve their customers. Find more results from this strong industry collaboration online at www.pmmi.org/aioe.

Technical Services

2012 saw strong contributions in both the national and international standards arena. This includes work on multiple ISO groups such as ISO TC199 – Safety of Machinery and ISO/IEC Guide 51 Safety Aspects using Risk Assessment. By finishing Guide 51 in 2013, PMMI will have cemented the principles of uniform risk assessment for numerous standards related to machinery.

Of particular importance to PMMI member companies in 2012 is the Joint Working Group for control circuit reliability. This working group, in which PMMI is an active participant, is addressing the methods of evaluating control circuit reliability used in Europe and the United States. Without a resolution, equipment manufacturers may have to adopt a completely new evaluation method with significant increase in cost. Hopefully, this will be resolved in 2013.