Volume 27 Issue 1

Labels & Labeling

The wider world of narrow web

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Feb/Mar 2005

Analysis

The automotive market has high expectations of its label suppliers

Analysis

Printed RFID antennae and nano-scale flexo point to an exciting future

Case study

A novel range of digital substrates opens up new market opportunities

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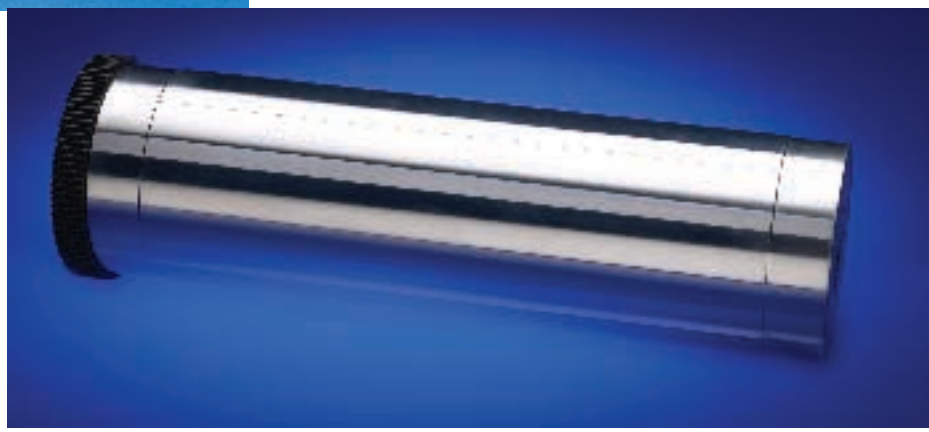

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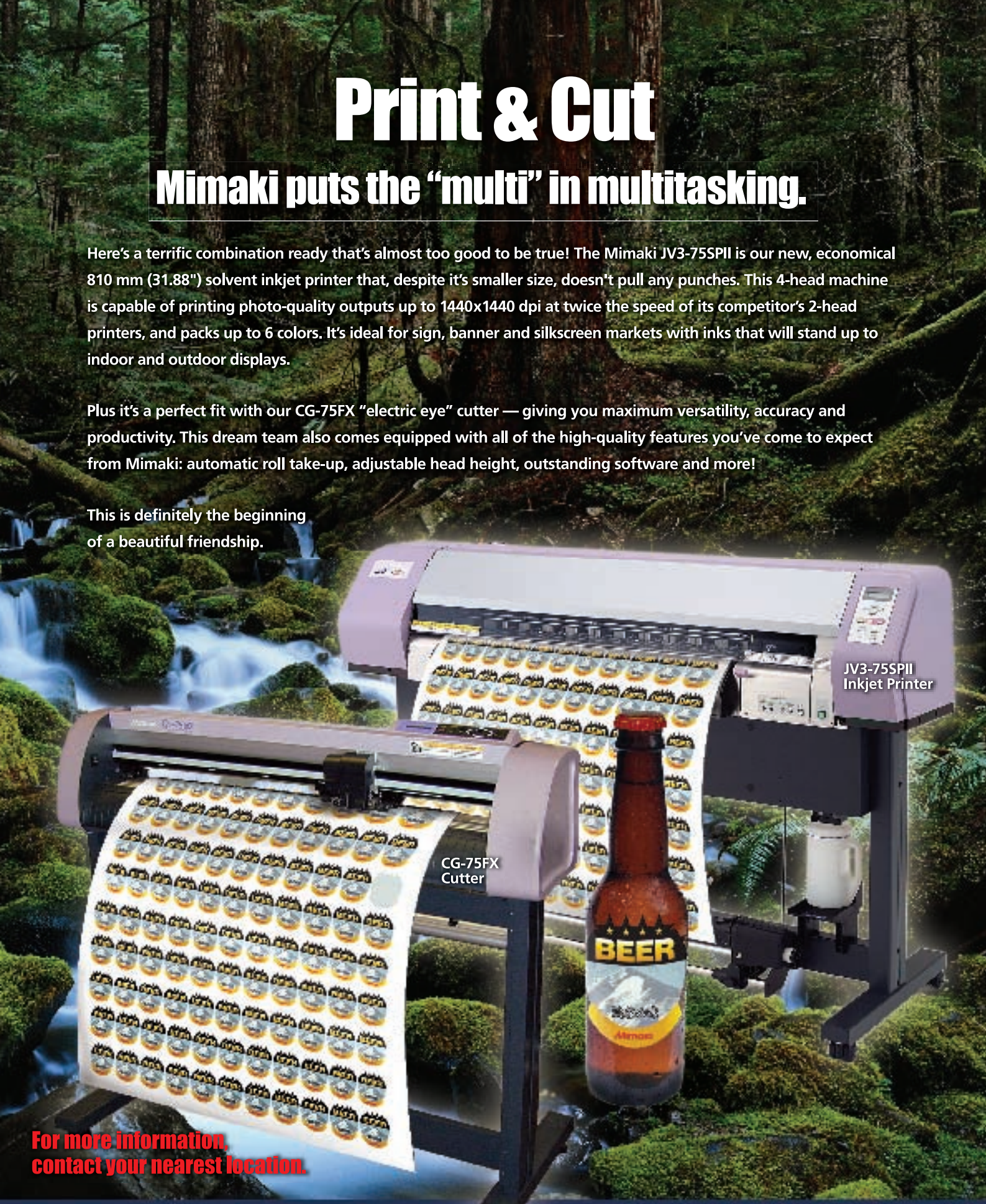

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Leader

In this issue we analyse the results of the visitor survey conducted at Labelexpo Americas among 470 converters. It provides a very comprehensive overview of how converters see the future of our industry.

One quarter of converters polled said a key future trend will be flexible production requirements. 16 per cent are looking to move into shrink and wraparound films, and 15 per cent into flexible packaging.

Machine manufacturers have responded with presses which have the ability to handle multiple substrates, and particularly thin films. Increasing use of servo drives allow tension control systems to be adjusted rapidly to accommodate thin, heat sensitive films. Presses are becoming wider and faster with more sophisticated inspection systems and 'cool' running UV.

Labelexpo has mirrored these trends in terms of the equipment and materials on show, and there is no question that shrink, stretch, wraparound and IML films are 'labels' and are the territory of the narrow/mid-web label converter with the appropriate equipment.

The interesting question is how we define 'flexible packaging'. How far should label converters be encouraged to go down the road to applications currently handled on wide web gravure and flexo presses?

One answer could be layer complexity. Narrow and mid-web machines are not best set up to handle the multiple in-line laminations required for food-

"How far should label converters be encouraged to go down the road to applications currently handled on wide web gravure and flexo presses?"

contact flexible packaging applications, although barrier coatings are perhaps another matter. Products requiring barriers to oxygen, moisture etc and which use inks and coatings – overwhelmingly solvent or water-based – which must be certified for direct food contact, can certainly be produced on narrow- to mid-web presses incorporating gravure units.

There is also nothing to stop label converters printing the top layer of pre-formed laminates, which could be anything from sachets to pouches. Indeed, we see a growing trend for wide web flexible packaging converters to partner with narrow/mid-web label converters to print short runs of already laminated materials which are not economical on wide format CI presses.

Additionally, there is nothing to stop label converters with the appropriate equipment from laminating and printing flexible packaging which does not have complex barrier requirements – shampoo sachets for example.

The possibility exists to open up completely new markets for short run flexible packaging products – particularly with in-line added value converting features – which have so far been unavailable to packaging buyers

Andy Thomas
Group Managing Editor.

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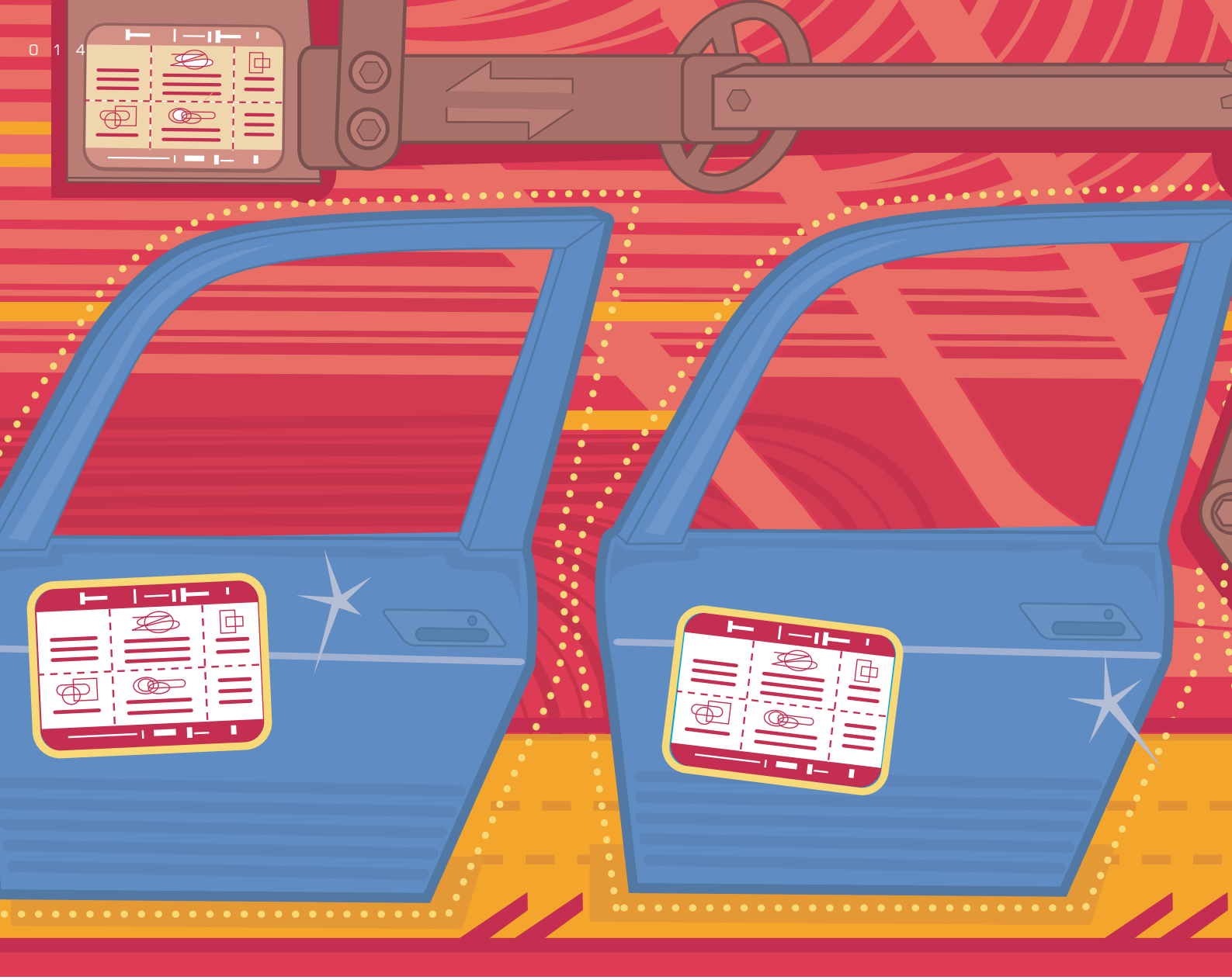


Driving innovation

The North American automotive market has high expectations of its suppliers. Converters face fines, annual cost-downs and the pressures of a globalized industry. **Katy Wight** reports

There are only a small number of converters that meet the criteria – and have the guts – to work with the automotive industry in North America. Since Detroit's heyday in the 1950s, intense competition from abroad and globalization have created an aggressive and just-in-time supply and manufacturing culture. The automotive original equipment manufacturers (OEMs) are increasingly placing heavy burdens on their suppliers – including label converters – to innovate, attain quality and continually save them money.

As a supplier to the OEMs, converters are as highly regulated as other major component suppliers. In fact, labeling plays one of the most crucial roles in optimizing the supply chain through parts marking and tracking, enabling the manufacturer to produce its most competitive vehicle.

'About 20 years ago, statistical process control was introduced to the automotive industry,' says Steven Pasbjerg, director sales, Schreiner Label Tech, Michigan. 'Quality was generally quite poor before this, and about three per cent of parts were faulty and could disrupt basic vehicle systems. American cars got a pretty bad

reputation back then. The objective now is to reach zero faulty parts per million.'

Schreiner Label Tech is a subsidiary of Schreiner GmbH &Co KG of Germany, a company with an annual turnover of $70 million, half of which is from the automotive industry. The North American office was launched five years ago to support the automotive electronics manufacturers Siemens and Bosch, which were transplanted from Germany to support OEMs like Volkswagon and BMW. Schreiner Label Tech's customers are predominantly tier one suppliers to the automotive industry (75 per cent), but it also supplies directly to the OEMs and would therefore be classified as a tier one supplier itself.

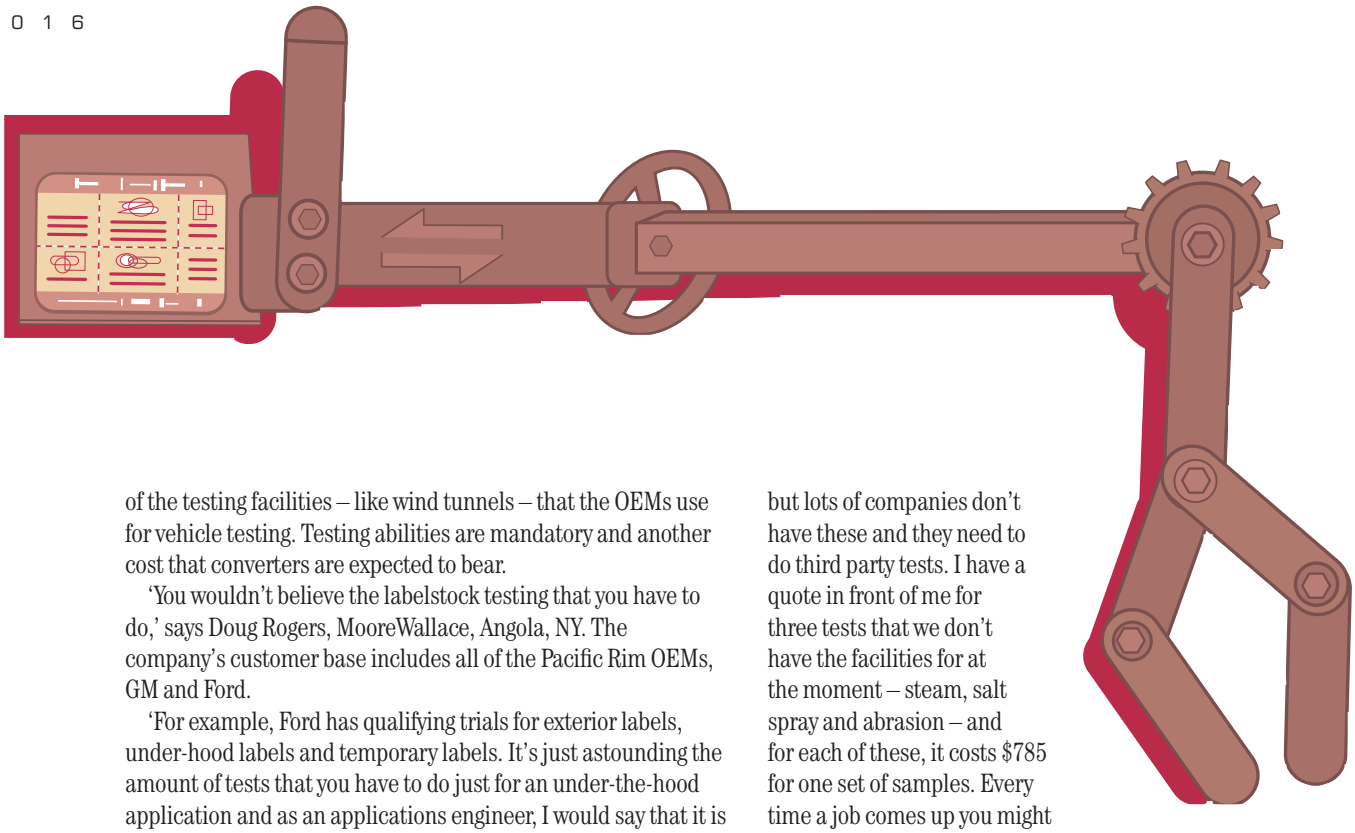
'The OEM requirements are extreme,' says Pasbjerg. 'The auto industry is more stringent than anything other than the pharmaceutical industry. A large percentage of our expenditure is in meeting OEM requirements and it's a big hurdle for any converter that's considering entering the market.'

Converters need a high level of certification – ISO 9002, ISO 14001, QS 9000 (which is more difficult and more expensive to attain than ISO) and the newest level, TS 16949. Not only do you have to comply with the standards, but it is actually very expensive to get qualified. Label production itself has to be highly controlled using statistical processes and traceability, from raw materials right the way through to the customer. You can't afford to make a mistake.

'We have a culture where it doesn't matter what time the OEM calls, we are there for them. We understand that they cannot afford to shut down a production line,' says Keven Hayes, executive vice president sales and marketing, Whitlam Label, Michigan. 'As a supplier, we understand that substantial rework penalties can occur. That means if you have an error or a label that can't be read, it can be very financially expensive – particularly if it is a two-cent label that has caused the problem. We have a number of controls to make sure that this never happens'

Whitlam label was the first label converter in North America to get TS 16949 certification for its manufacturing process and ability to supply customer satisfaction metrics, and also achieved UL/CSA in 2004, which is a quality mark for the electronics industry. Over 30 years old, Whitlam has been servicing all of the major OEMs since the 1980s and now also supplies other tier ones like Johnson Controls, Visteon and Delphi. Whitlam has over 20 flexo presses in its Michigan facility and recently beta-tested and invested in the new Jetrion 3025 drop-on-demand inkjet system for variable data labels.

Whitlam has a complete in-house testing facility, but operating just outside Detroit means that it also has access to all



of the testing facilities – like wind tunnels – that the OEMs use for vehicle testing. Testing abilities are mandatory and another cost that converters are expected to bear.

'You wouldn't believe the labelstock testing that you have to do,' says Doug Rogers, MooreWallace, Angola, NY. The company's customer base includes all of the Pacific Rim OEMs, GM and Ford.

'For example, Ford has qualifying trials for exterior labels, under-hood labels and temporary labels. It's just astounding the amount of tests that you have to do just for an under-the-hood application and as an applications engineer, I would say that it is a major trauma.

'If we are looking at printing the frame label for a Ford truck, it might require $14,000 worth of testing. The sales team is pushing hard to pick up the Detroit big three – Ford Motor Company, DaimlerChrysler and General Motors – but you have to weigh up, after the cost of all the tests, what you have to gain.'

The under-hood label is the most durable application in a car. Ford has an A4-sized under-hood label which MooreWallace tested for its appearance and adhesive performance at 125 degrees centigrade after 72, 121 and 1,000 hours. The label also has to be tested against steam, air pressure, chemicals, battery acid, humidity and then it goes through numerous environmental cycles – ten hours each at –40 and 121 degrees centigrade. The OEMs want to ensure that the labels will be more than good enough for the job.

'We have a certain amount of testing equipment here,' explains Rogers. 'We have a hot and cold cycle from freezing to humidity, heavy duty UV exposure and paper testing equipment, but lots of companies don't have these and they need to do third party tests. I have a quote in front of me for three tests that we don't have the facilities for at the moment – steam, salt spray and abrasion – and for each of these, it costs $785 for one set of samples. Every time a job comes up you might have to undertake 13 lots of jobs and it costs to farm them out.

'As a company we are having an internal fight,' he adds. 'From my point of view as an applications engineer and that of the sales department, there are tremendous opportunities to follow, but manufacturing is the one who will have to bear the cost.

'The market is shrinking as former players are bowing out because they don't have ISO or they don't want to pay for all the required tests.'

The past twenty years has seen a major shift in responsibility from the OEM to its tier one suppliers. Automotive Engineering 2010, a research report prepared by Roland Berger Strategy Consultants in 2004, predicts that suppliers will be responsible for nearly 60 per cent of the industry's research and development work by the end of the decade, compared with 40 per cent today. This has thrown up a number of challenges for label converters.

Lisa Koval, director of marketing, Automotive Products Division, Avery Dennison, explains how working practices have adapted: 'Most of the North American labels are driven by government regulations and not because the OEM necessarily wants them,' she says. 'The OEMs have pushed a lot of that responsibility onto the tier ones. Now that we are providing labels directly to the parts supplier, we have had to adjust to labeling different materials. For example, we have had to work out how to label a plastic component at origination, when it is fresh out of the mold. As a result we have had to develop new adhesives and techniques.'

Despite significant increases in product content and complexity, OEM research and development budgets have remained flat and are expected to remain so in the future – the price of an average vehicle, based on the US producer price index of motor vehicles has remained virtually unchanged since 1993. Who is bearing the brunt of the costs?

'Over the last five years, the OEMs have insisted on cost-downs,' says Hayes of Whitlam Label. 'After a while you can't achieve the reductions though price cuts alone and we have had

RFID

The Automotive Industry Action Group has a standards committee that has been educating the industry about RFID so that when the technology is mature enough, it will be ready. Avery Dennison is an AIAG sponsor member.

'There is a lot of interest in RFID, but the automotive industry hasn't proved the business case yet,' says Koval. 'Everyone talks about the cost of the tags, but it is the cost of installing the necessary infrastructure that is inhibiting.

'In terms of the tags, we have a solution in place. We have been working on tags that will work in an automotive environment, where there is a lot of metal, heat, dirt and oil. The products are here, so the prices will start to go down.'

In the short term, RFID will really make sense for tracking non-line of sight and security components like airbag systems. Eventually, RFID could be the cornerstone of customized cars, chosen online and shipped within days.

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Jim Williams, founder of Polyonics, outlines some of the harsh environments that automotive labels must withstand:

Catalytic converters

In the manufacture of catalytic converters, barcode labels can be used to identify the ceramic materials used throughout the manufacturing process. The labels must also be made from a ceramic material, so that when the 'green' or unfired ceramic core is fired to become a true hard ceramic, the barcode information is fused into this core. The information is permanently available for automatic identification further downstream, as the catalytic converter assembly becomes part of a vehicle.

Batteries

Barcode labels are commonly used in the manufacture of batteries for automotive products. The labels may be made of polypropylene which resists sulfuric acid spills encountered in the battery manufacture. Acid resistant adhesives are required for the same reason. High temperatures may also be encountered due to the heat generated in the battery charging process.

Masking

Special label constructions are very common in painting and metal finishing operations. Labels are often masked with a protective lamination as they are applied to a metal part, prior to painting. After the painting operation is complete, the lamination layer, now covered with paint, is removed to reveal the pristine label underneath. Historically, these labels and laminations have been made from special heat resistant polyesters. With the advent of higher temperatures required for powder coating operations, alternative films may be required, such as PEN or PEI. Special adhesives are also often required due to the rough or porous nature of the cast metal parts (such as axles) prior to the metal finishing operation.

Tires

Special adhesives, coupled with polyester films are required in tire manufacturing. The label is printed, and often laminated, and applied to the 'green' rubber of the tire before it is vulcanized. It must withstand the high temperatures (300-400 F) encountered in vulcanization to be useful for product identification and inventory control in the value chain of the final vehicle. Similarly, labels have been used for identification of fan belts, rubber hoses, or other rubber components necessarily used in the vehicle.

Exhaust

Labels are also used to identify tailpipes, mufflers, or other parts of the exhaust system which will encounter higher temperatures. Polyester materials tend to be used, although in some cases polyimide labels have been used, when temperatures exceed 400°F for extended periods of time. In some cases aluminum labels with silicone adhesives have been used.

Interior

Labels for use in the passenger compartment must be flame retardant in accordance with FVSS 302 (Federal vehicle safety standard). Identification tags for cloth covers or upholstery, and labels for seat belts must be durable and wear resistant. Flame retardant Tyvek (DuPont), Tedlar (DuPont), vinyl, and polyester are commonly used, depending on the precise requirement.

to achieve our targets through innovation.'

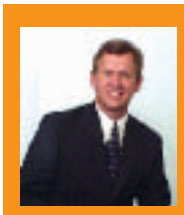
Supplier integration is seen as critical, as suppliers assume a larger role in the vehicle development process. Avery Dennison has been supplying to the North American automotive assembly plants for forty years and is realigning its working practices to meet the needs of the industry today.

'The growing demands of the OEMs has changed the way that we do business,' says marketing director Koval. 'Labels are a low-spend component and we are always at the back end. At the end of a model launch they decide that they need a label, but it is actually a very critical component. In 2004 we revamped our APQP (advanced product quality planning) process to get involved at the design stage with our customers. We aim to maintain close ties with design at the OEM and through the supply chain. Our more sophisticated clients have already caught on to this.'

Thirty per cent of Avery Dennison's Automotive Products' sales revenue comes from new products that have been introduced in the last five years. Koval explains that continuing to drive innovation is a challenge. Consolidation between the tier one and two suppliers is frequent and the buyers that Avery Dennison usually works with are entry-level employees with a fast turnover. The company continually has to plough effort into re-qualifying products every time there is a merger, acquisition or staff change.

Another problem arises when tier one and two suppliers go to non-certified label converters. Hayes of Whitlam Label says that OEMs are unlikely to purchase from unqualified suppliers, but it is possible that a tier one supplier could do it unwittingly.

'There is a definite lack of quality and consistency where tier



Pressures from supplier integration:
Steven Pasbjerg, director sales, Schreiner Label Tech

- When you are submitting a part, you need to have a PPAP (production part approval process). This requirement was introduced about 12 years ago. A PPAP for a label costs just as much as it would for a major component.
- DaimlerChrysler requires that we check their website five times a day to check our products haven't incurred a non-conformance. They won't call you anymore. Instead of the four or five engineers that did the job in the past, now they just have one.
- Now, all of the engineering diagrams have to be in the individual OEMs' specified format and everybody's drawing formats are naturally different. We have to be able to provide every format.

one and twos have gone to non-certified printers,' he says. 'I recently did some label surveys with OEMs and there was a number of issues we saw in cars that had been used for several years – the labels were peeling off, fading, yellowing, they weren't resistant to oils, brake fluids, engines shampoos, abrasion and other problems cropped up that stemmed from environmental factors such as extremes of temperature.'

The Globalization of the automotive industry

'At present, the capacity to supply products to any part of the world and to solve problems that may arise, is a required condition for any company working in the automotive industry,' says Roger Puente, marketing manager, DISA Autoadhesivos, Spain. Converter DISA was founded in 1963 and has focused its activity on the development and marketing of specialized, high performance self-adhesive products. It has an annual turnover of Euro 22 million and exports to 51 countries. Spain is ranked sixth in world vehicle production volumes and DISA converts labels for all of the major global vehicle OEMs, as well as domestic European brands. Puente says that OEMs in Europe have the same high requirements and suppliers face the same pressures as the North American industry.

'Manufacturing moving offshore is one of the present challenges,' says Puente. 'The moving of factories toward zones

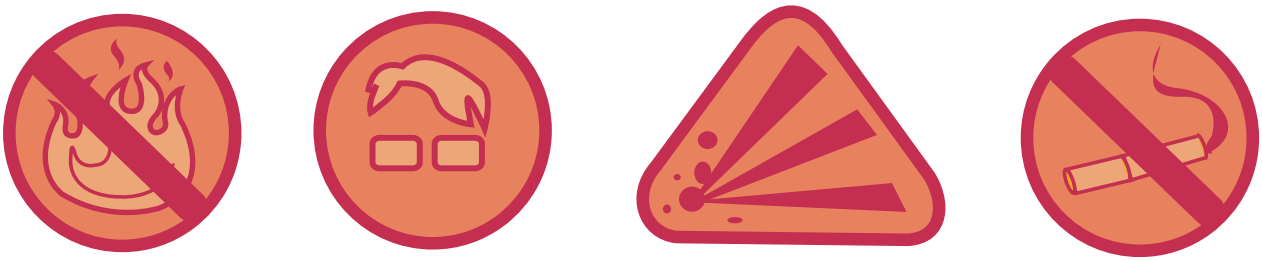
Why are the OEMs labeling?

- Warning and safety labels to ensure passenger safety and reduce liability and insurance costs
- Security, anti-counterfeit or anti-theft
- Parts marking or tracking to produce competitive vehicles by optimizing the supply chain
- Branding

(Bottom right) Roger Puente, marketing manager, DISA Autoadhesivos, Spain

of lower production costs is at the same time a threat and an opportunity, depending on how this change is confronted.'

The automotive centers of engineering remain in Detroit, Japan and Germany whilst the manufacturing side has definitely seen a shift to Latin America, China and Korea. Detroit still attracts OEMs because of all the engineering, testing and

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outsourcing resources available in the area, but manufacturing has definitely slipped somewhere south of that.

As many of the OEMs and tier ones have moved to Mexico to exploit lower labor costs, the label converters have been forced to follow. Like Whitlam, who acquired a plant along the Mexico border at the end of 2004, many converters see the benefits of 'maquiladoras' (also know as 'twin plants'). Maquiladoras are manufacturing plants in Mexico owned by a parent company in the US. Companies operating in the US can send equipment, supplies, machinery, raw materials and other assets to Mexico for assembly without paying import duties. The goods can then be exported back to the US or another country.

In the past ten years, two significant regional trends have been the decline in Japan's share of world production and the increase in Asia and other developing markets. The decline in Japanese production is to some extent the result of deliberate decisions by Japanese makers to invest in production facilities closer to their main markets.

'It's difficult penetrating the Japanese market without having manufacturing in Japan,' says Koval of Avery Dennison, 'but the Japanese OEMs that have come to North America to manufacture or assemble have been a significant opportunity for us. We are expecting this business to grow.

'The Japanese big three (Toyota, Honda and Nissan) are very different to the Detroit big three. It's difficult to get qualified with the Japanese, but once they're with you, they'll stick with you. They are more profitable and they value innovation. The Detroit three are very aggressive. Their cost pressures must be very acute as it is a declining market, but they are driven by short-term thinking in comparison to the Japanese.'

Cultural differences can also be a barrier to growth. Koval says that Avery Dennison has easily influenced Ford and GM in Europe, but has found that the domestic European OEMs already have their own well-established suppliers and are resistant to change. But, Avery Dennison is well placed to conquer foreign business.

'Avery Dennison has manufacturing, sales and distribution worldwide and we can leverage ourselves on that presence,' says Koval. 'You need to have dedicated business development resources regionally.'

These resources have enabled Avery Dennison to enter the Chinese market. Koval says that China has become a significant growth area for the company because of all the new car parts that are being manufactured there. With the famed rise of the Chinese middle class, OEMs like Ford, GM, DaimlerChrysler, Mercedes and BMW have all moved into the region.

'The cost of labor is so cheap,' says Pasbjerg of Schreiner Label Tech. 'I believe that in the next ten years it will be one of the biggest exporters of cars in the world. At the moment production is just serving the local region. We are looking at China in terms of establishing another manufacturing plant. With the projected growth in the Chinese market, it is only logical. This might also give us the ability to supply to Indonesia, Korea and possibly India.

'You have to be able to cater to the whole world in order to survive,' he concludes. ■

Counterfeit parts

It's estimated that counterfeit parts cost the automotive aftermarket over $12 billion in lost sales and if these losses were eliminated, the auto industry could hire 200,000 additional workers. Even more pressing, is the inferior quality of some of the fake parts in circulation. There have been cases where crucial safety components such as brake pads have been made of materials like cardboard and OEMs are finding ways to crack down.

'Counterfeit parts and reimportation are potentially a very big issue,' says Pasbjerg. 'We believe that this are could be a significant opportunity for Schreiner and could account for up to 20 per cent of our business in the US.'

Kevin Hayes of Whitlam adds: 'We produce a number of security solutions for the OEM. The need for security solutions has emerged in the last five years, mainly due to the "gray" market: the first two shifts are producing genuine parts, while the third shift is going off to the gray market.'

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Indian opening

India is the latest regional market to excite the attention of the global labels industry, and last December saw that interest focused on the second India Labels Show. **Andy Thomas** reports

Over the last three years the labels industry worldwide has been converging on key technologies and applications as the global brands seek to market their products to increasingly affluent consumers around the world.

India has a population of 1.2 billion and an affluent middle class estimated to number 250 million, providing a potentially huge market for branded goods.

But India is a complex economy, divided between the 'organized' sector – which includes Western-style malls and retail outlets – and the 'unorganized' sector, where goods are sold through markets and other informal channels.

Analysts put wet glue at anything from 80-95 per cent of the total Indian labels market. But the potential for PS growth is huge. In 2002 the organized retail sector accounted for just 2 per cent of sales in India. This will grow fast, but will still only account for 6 per cent of retail sales in two years time. India has 40 cities with a population of more than one million, but the top ten cities account for 95 per cent of the organised retail sector, leaving huge room for growth. More than 200 shopping malls are planned or under construction.

Recent surveys show Indian food and apparel brands planning to double or treble their investments in the next 3-4 years. Foreign retailers have only a limited presence – mainly through franchises – due to heavy restrictions on foreign direct investment, but this will change as India integrates into the world economy through the WTO. India is already a preferred sourcing base for some of the world's top retailers, educating Indian manufacturers in the requirements of global quality standards. $1bn worth of goods are exported to the US from India. This will be a vital factor when the large international retailers finally make their forays into India.

All this activity has resulted in growth rates of up to 19 per cent in labels of all types, with film applications growing at well over 20 per cent. Yet the consumption per capita of PS is less than one per cent.

Narrow web development

There are no more than 100 modern rotary narrow web presses installed in India today. Major problems face Indian converters wanting to buy equipment from international suppliers: 40 per cent import duty and the difficulty in obtaining rotary tooling. With no international die manufacturer based in India, it can cost £500 to import a rotary die after import duties and customs taxes, with lead times up to a week. With no concept of a minimum order, this can sometimes represent the cost of the job.

"Our stand was crowded with flatbed letterpress printers looking for information on rotary solutions and for new market opportunities"

Interest in rotary tooling is clearly growing, as Kocher & Beck's Martin Stierle confirmed: 'Our stand was crowded with flatbed letterpress printers looking for information on rotary solutions and for new market opportunities. I have found these people more progressive than printers in China.'

Martin Stierle says that his company can turn a flexible die order round in two working days from receipt of cutter profile. The die will be delivered in around one week taking account of customs delays. Interestingly, Indian company Apexrototech introduced a magnetic cylinder at the show.

Flexography has still to make a major impact in India. Aside from issues of import duties and rotary tool availability, there is a persistent feeling that letterpress is the superior print process.

Added to this is an acute shortage of high quality flexo platemaking and ready availability of key consumables like anilox rolls.

However, the India Labels Show demonstrated that things are changing.

Ahmedabad-based pre-press house Pin Mark was promoting its installation of India's first Creo Thermoflex flexo computer-to-plate system. Pin Mark utilizes input systems from Esko-Graphics and Artwork Systems', including shrink sleeve dispro options. Also present was North American-based anilox roll specialist Harper Corps, which recently set up operations in Thailand.

Local availability of high quality flexo inks has been less of a problem since Sicpa started manufacturing in India. At the show ANI announced a joint venture to produce narrow web inks in India.

Rotary screen technology is available through Stovec Industries, a joint venture between Stork Prints and ATE Stovec, an Ahmedabad-based manufacturer of nickel screens, pre-sensitized plates and anilox rolls.

Key Indian label converters are already blazing a quality trail with flexography as good as anything found in Europe or North America. This was clearly demonstrated by the India Label Awards held during the show and sponsored by Avery Dennison and GiDue.

Heidelberg India's flexo business manager Sudhir Samant confirms a trend towards combination flexo/screen/foiling presses for an elite group of Indian label converters. Five EM280 combination presses have been sold into India in the last year. 'We can't position the EM410/510 machines for the pressure sensitive sector in India, but we are promoting them for shrink sleeves, wraparound and roll carton applications where gravure is currently dominant,' confirms Samant. 'We expect the unsupported film sector to give us major growth as PS becomes more saturated.'

Samant sees major opportunities opening up in key sectors like pharmaceuticals, where PS has already reached 50 per cent penetration. Interestingly, two Gallus EM280 flexo presses have been installed at commercial offset printers – a major

Indian quality excels

Writes Mike Fairley: Superb quality label samples being given out on the Heidelberg/Gallus booth at the India Label Show were printed by Indian Label converter Wintek Flexo Prints, a manufacturer of self-adhesive labels, product labels, bar code labels, computer labels and stickers. The company's leading clients include brand owners in cosmetics, toiletries, shampoo, pharmaceutical and ice cream sectors.

Printed on a Gallus EM280 8-colour press with rotary screen, UV flexo and in-line hot foil stamping, the labels are to a quality which would be accepted by any leading brand owner in the world. Helping to produce the quality results are the company's Crosfield and Hell scanners and DuPont plate technology.

Founded in 1996 in Bangalore, the company's first machine was a Mark Andy 830 press. Today the company operates three Mark Andy 830 presses, the Gallus EM 280 and a further Gallus water-based flexo press with hot foil stamping.

"Samant sees major opportunities opening up in key sectors like pharmaceuticals, where PS has already reached 50 per cent penetration"

opportunity for sales of top end rotary machinery.

David Lee, md of UK-based Focus Machinery – exhibiting on the stand of Indian agent Label Planet – comments that as recently as three years ago, flexo was a 'black art' in India. 'But now plate and ink support is coming and Kocher & Beck, Gerhardt and Electro-Optic are here at this show. With globalization everyone has to raise the quality bar.'

Rotary letterpress is an important technology in today's narrow web sector. Labelmen stopped its activities in India for a few years because its machines were being copied and sold at half the price. The new strategy is to show its high-end machinery, and a PW260 letterpress, incorporating cold foil stamping, was shown for the first time in India.

The India Label Show proved to be a very successful event for major agency Flexo India Graphics Pvt. Limited (FIG), according to L&L's Mike Fairley. 'The company obtained a large number of prospects for Mark Andy presses and for Rotoflex slitting, rewinding and inspection machines. There was also a lot of interest for the company's new agency, Karlville, a leading provider of machinery solutions for converting shrink sleeves.'

Formed in 2000, FIG has developed as one of the most talked about distributors in the Indian sub-continent, becoming one of the biggest distributors and service providers of flexo presses and associated equipment to the market. Exclusive agencies include Mark Andy, Kluge, Tools & Production, Trucolor, Alpha Sonics, Rotoflex, Karlville and Corotec.

'We have put together a group of complimentary agencies so as to provide a one-stop solution for flexo technology in India', said chairman Peter Tørsløv, 'and, as such, this has been a very good show for FIG. We are doing both good business and creating long-term potential.'

Rotoflex was promoting its high end Vision and E-Drive systems. Val Rimas reckons there are currently around 25 Indian label converters who can afford to invest in top of the range quality control equipment. 'I see this as a long term plan,' says Rimas.

Other Western press manufacturers which have taken the plunge into India include Gi Due, which started its Indian operation two years ago in Mumbai, appointing Vijay Pareek as its national sales manager. The company currently has four Combat presses installed. Joint md Cristina Toffolo commented 'In India you can trust people, and this has a lot to do with their religion.'

On the KDO stand md Russell Oddy and his Indian agent Mukul Raja, reported a strong awareness of flexography. 'Today people understand the advantages of flexo over offset in applying metallics and its greater versatility,' says Raja. 'Indian consumers like metallics, and there are anti-counterfeit applications. We can also run multiple passes through a flexo machine which they can't through offset.' The company has nine presses installed in India, with three companies installing multiple machines.

For HP Indigo, which took a ws4050 to the show, the big question was whether India is ready for digital presses. The company's Vijayan Shilpa commented, 'The label converters that visited the show definitely confirmed what we know – the label market is moving toward short runs and India is no different. For HP, the event helped us define a Go to market model to address the Indian customer needs.'

Brazilian press manufacturer Etirama recently sold its first flexo press into India through agent Global Graphics. The press on stand was a 250mm wide Flexorama CI system with 400mm printing length and triple die cut units. Carlisle Machinery sold a machine at the show and had 4-5 possible orders.

Labelstocks

Avery Dennison is the dominant Western labelstock supplier in India, with its own production facilities. Avery's European and North American rivals face the prospect of long lead times and high import duties on imported laminates. Many Indian label printers coat PS paper labelstock for their own use.

Avery's main competitor in India is Weldon Celloplast, which manufactures a wide range of laminates for prime labelling and VIP applications, and introduced a range of security labels at the India Label Show, including a customisable Void

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"On the positive side, end users are getting more aware of the need for automated roll fed PS applicators, particularly in the lubricant, pharma and cosmetics industries"

material and UV sensitive films. 'In India, counterfeiting is always a problem, but companies do not want to put up their packaging costs. They do not realise that the brand loses by losing customer confidence' says md Harveer Singh Sahni. Weldon's focus is on the pharmaceutical and drugs markets. 'Companies in India will follow trends in the US and Europe. The big pharma companies are now asking us to make presentations.'

Holostik India was also showing new authentication products including holographic scratch, strip, stamping foil and paper security labels. Pre-formed holographic shrink sleeves are under development. Holostik has its own 'vigilance teams' which work with brand owners to help tackle counterfeiting.

A factor holding back PS is the relatively low cost of wet glue applicator equipment, which in India is some four times cheaper than PS applicators. But Mahesh Mevada, president of Bhavani Labelling Systems, says the situation is changing fast. The family-owned company was set up 40 years ago producing wet glue applicators, but in the last 4-5 years has introduced automated PS applicators.

'There has been a dramatic move towards PS, and a big move from glass to plastics containers where glue labels are hard or impossible to apply. PS is now affordable and the applicator machine is easier to use compared to wet glue.'

Between 80-90 per cent of the company's PS applicators have been installed in the pharma sector. 'Our PS system is designed to be plug and play because of the shortage of skilled labor in India where our machines are installed in remote places.'

Bhavani estimates that in the pharmaceutical sector PS is growing around 30-35 per cent faster

Printers' round table

During the India Label Show, L&L hosted a series of discussions with major Indian label converters – including Vivak Kapoor, Icon Label, Gautam Kothari, Interlabel, Sandeep Laveri, Preeti Arts and Manish Desai, Mudrika Labels. We looked at the problems and opportunities facing the Indian narrow web industry.

On the positive side, end users are getting more aware of the need for automated roll fed PS applicators, particularly in the lubricant, pharma and cosmetics industries. Large government-owned corporations like Indian Oil are often leading the way.

Also end users are becoming more quality conscious, which is driving demand for 100 per cent inspection systems. Indian consumers are very quality conscious and Indian-owned brands are starting to specify similar packaging to multi-nationals.

While wary of the dominant market position of Avery Dennison, the printers agreed that the company should be given credit for growing the PS market – particularly in filmic labels.

Many problems would be echoed by label printers the world over, while others are perculiar to India: increased materials costs not being met by end users; new entrants taking jobs at suicidally low prices; excess capacity due to the small size of the organized retail sector; high ratio of raw materials costs to the sales price – sometimes as high as 80:20, which can represent the whole margin. Government action is needed to harmonize the regulatory framework between states and to take away the tax advantages of the unorganized sector. Because there are no manufacturers of rotary tooling or aniloxes many printers are staying with flatbed letterpress rather than moving to flexo said the panel.

'A rotary die can cost 45,000 rupees ($500), compared to 1,000 rupees for a flatbed die. If we have an accident with the anilox we have to order it again from outside India. Also, flexo can't have too many changeovers in a day. Start-up waste is 200metres because we have unskilled operators and the whole job may only be 3-6,000 running metres. Above all, this is still a short run, low quality market. We get our orders in small lots, even if the overall order is a big one. In Europe, you have a minimum order charge – not in India. Flexo is faster, but that is no good if you are not controlling your materials in the heat and humidity of the Indian environment. In theory though, flexo should be better for longer runs. There is also a lack of technical support.'

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"There has been a dramatic move towards PS, and a big move from glass to plastics containers where glue labels are hard or impossible to apply"

than wet glue and similar trends will appear in food, cosmetics and general product decoration. The company is now entering the sleeve market and will shortly launch a shrink sleeve machine.

This is a smart move, since shrink sleeving is growing at a rapid pace in India, where PVC has none of the negative environmental associations it suffers in Europe. In India shrink sleeves can be half the price of filmic PS laminates, and in some cases cheaper than paper PS laminates.

Makers Polyfilms is an ISO accredited Indian company which manufactures PVC, OPS and PET shrink film. The company's commercial manager Prashant Desi, estimates the Indian shrink sleeve market is growing at 30 per cent a year. Makers supplies the whole shrink package, including the sleeve maker and tunnel to end users. Their materials are converted on wide web gravure presses and the market is mainly replacing direct print.

Indian machinery

With imported machinery attracting such high import taxes, local manufacturers are looking to capture a significant share of the growing narrow web equipment market. Indian press manufacturer Multitech was showing a UV flexo press with a quick change system featuring tool-less anilox removal. Also new is a moveable converting station which allows any combination of gravure, embossing, screen, cold foil and die cutting at any press position. The process stations share a common nip and IR/UV drying system. The gravure unit is typically used to lay down heavy solids like golds and whites, and solvent exhaust can be built into the press. The cold foil system was developed in association with Kurz and ANI. The press was shown with a closed loop register control developed with BST Sayona India.

Multitech is looking to break into the European market and recently sold its first press to an Italian label converter, through agent CFC. Berkeley Machinery, which manufactures disposable ink trays, is actively looking at sales prospects in the UK.

Multitech started out in business forms presses and is now developing a 610mm offset combination press with UV flexo, gravure and foiling stations for labels and carton production. It will handle repeats from 9-24 inches. The company believes an offset machine will allow it to attack the Japanese market, where offset remains the benchmark for quality. Multitech is now working with Baumuller to develop shaftless drive systems to address the issue of repeat size change.

Jandu has now developed its first modular flexo press, the MCD 1053, with five color stations, three die cutting stations, auto tension control and a wide range of options including UV curing, turnbars, lamination station, sheeters and slitters. Along with its established export markets in Nepal, Sri

Dumping woes

One of the problems identified by Indian labelstock manufacturers and their suppliers is the 'dumping' of out-of-specification material from outside the country.

'India is becoming the dumping ground of the world in seconds and stock lots, which is being lapped up by unsuspecting printers and brand owners and severely affecting our bottom lines, says Harveer Singh Sahni, md of Weldon Celoplast.

Ahlstrom's Marco Markinez agrees: 'The big manufacturers use India as a dumping ground – especially from the US and also from Europe. Offcuts are dumped at a price less than 50 per cent of the stock lots in Europe.'

In response, the Indian Labelstock Manufacturers Association has been formed. 'We're talking about how to bring in a quality certification, or persuade the government to introduce anti-dumping legislation,' says Harveer Singh Sahni. 'It will be a long fight, but at least it has started.

It will also educate printers and brand owners about the perils of non-standard materials affecting the growth of the whole industry in the medium and long term. It involves fifteen of the country's top label stock manufacturers across eight cities. Sahni is one of the prime movers of the association and its first president.

Lanka, Iran, Indonesia, Malaysia and Saudi Arabia, the company is also now looking at Europe.

ApexRototech showed its first flexo press, a 4-station machine with UV coater and lamination station. The press is available up to 10in wide with three die stations and a sprocket punching unit. The company is talking with Allen Bradley about servo drive systems for the press, first for individual print units, then for the whole press.

Webtech Engineering was showing is entry level Webmark CI flexo press, with interstation dryers, a working width of 255mm and materials range of 50-250 micron. The press on show was a three color machine, with options to go to four or six and two die cut stations. The press can be specified for water-based, UV, IR, solvent systems. Cold foil is under development along with a cold UV solution for heat sensitive substrates. The press sells for around $30K. According to Webtech executive director GD Agrawal, the company is now looking for tie-ups in Europe to market its machines to expand its sales network which currently spans the Middle East and Africa.

For reasons we have covered, flatbed letterpress remains a strong force in India, and Keen Engineering Works demonstrated its new KS-28 4-color machine. The machine has a 500mm print bed, 310mm die cut and operates at up to 9,000 impressions an hour. The inking system features an over-size oscillating print drum with grinding ink rollers and additional ink grinding plate to give smooth kneaded ink for printing. Three ink form rollers supply ink to the plate for halftone and solids printing. Jobs can be re-registered through the press controlled by eye mark, and the servo driven drive is claimed accurate to +/- 5 microns. The press has a computer sprocket puncher, in-line lamination and foil stamping unit.

Kohli impressed at the last India Label Show with a 250mm wide narrow web gravure press optimized for short runs of shrink sleeves. That project has been shelved, temporarily at least. One machine was sold, but it proved too expensive for the Indian market. A 6-8 color machine is under development, possibly in web widths up to 600mm which we await with interest.

Kohli specializes in the wider web gravure converting systems used for shrink sleeve label production in India. Key export markets include Russia and the CIS states, Mexico, Sri Lanka and Greece.

At this show the company was concentrating on its Unidrive inspection-rewinder, built from the ground up to incorporate AVT's Print Vision Helios inspection system. Using defect information gathered from the on-press camera, the web is reversed at high speed and the rejected label section delivered to the operator on the splice table. When inspection is engaged, web speed is 100 metres/minute.

An interesting perspective on the development of the Indian equipment industry came from Mumbai-based UV systems manufacturer Daddikar Lighting Pvt.

UV is still a relatively small business in India, although growing through new letterpress and flexo machines and as retrofits on the second hand European and North American machines coming into the Indian market. Where on-line retrofitting is impractical due to compact press, the company also offers off-line units.

'We Indians have to work hard to get our brand accepted, because people have supplied not so good products in the past. We must generate trust and a reputation for honesty. The business approach in India is changing with education, with the internet and with WTO entry. This will open the market so if products are not to international quality Indian companies will not survive against international competition.' ■

Outsourcing hub

The labels industry in India already has a highly developed international outlook. A converter like Mudrika Labels, for example, which exhibited at the Label Show, already exports labels to the UK, Dubai, Sri Lanka, Bangladesh, Nigeria, Ghana, Uganda, Kenya, Tanzandia and the Yemen.

Indian label converters interviewed by L&L are looking to position themselves as an outsourcing hub for global brands. India is emerging as a competitive outsourcing centre to China, playing on the advantages of widespread use of the English language as well as comparatively low cost of land and labor.

The bigger converters are seeking alliances with European/North American converters particularly in sectors like pharmaceuticals, where global buying is already a reality. Indeed, the only European converter with a stand at the India Labels show specialised in just this area. Reynders Etiketten is one of Europe's major label converters with plants across Holland, Poland and France. The company's Jacques Reynders told L&L, 'There are exciting possibilities for a joint venture in India, particularly with the relatively low cost of shrink sleeving vs PS.'

Such alliances would require Indian Label converters to meet international pharmaceutical (GMP) standards. In the Indian domestic market the use of barcodes is still not a general requirement.

This points up a wider issue. Global retailers and brands today require their suppliers to work to international certification standards such as ISO and BRC/IOP hygiene accreditation. Just a handful of Indian converters are ISO accredited today.

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Flexo 2005

This UK show will be held between 15-17 March at the NEC, Birmingham. Although aimed at the whole flexo community including wide web flexibles and corrugated, some exhibitors are showing products of interest to label converters

3M United Kingdom PLC

3M United Kingdom PLC will show its latest developments in plate mounting tapes and feature a full range of products with patented micro channel liner that virtually eliminates trapped air between the tape and cylinder or sleeve and between the tape and printing plate to speed up mounting.

Agfa Packaging Solutions

Agfa Packaging Solutions will demonstrate its new Sherpa proofing solution for screened proofs, Pantone matching based on spectral colour measurements and remote proofing. Visitors will also see Agfa's Value Added Tools, Sublima Screening for extended tonal rendering and Alterno colour conversion technology to simulate spot colours and the dot factory digital printing solution for packaging applications.

Alphasonics

Alphasonics will launch a new parts washing system. The AS1000 system will initially clean the parts using Alphasound with water and a neutral chemical stored in a holding tank within the system. At the end of each washing cycle, the wash water is pumped to a separate tank and the pigment removed via the process of flocculation. The now clear water is then returned to the holding tank for re-use. The water used within the system is never replaced, but simply topped up. The chemical is used at a much lower percentage than current systems with lower consumable costs, says Alphasound. The resultant pigment is in the form of a "cake mixture" and attracts greatly reduced costs in relation to disposal.

The remit of Flexo 2005 has been expanded to include suppliers of digital press and finishing systems, and for the first time, major digital press systems suppliers will be participating including Agfa (Dotrix), HP Indigo, Scitex Vision, and Xerox. In addition to being able to compare innovations in both flexo and digital technology, visitors will be able to seek advice from the on site, Time to Market (T2M) Solutions Advisory Centre. Providing technical assessment on real time jobs, T2M will feature a series of industry led debates on short run production, supply chain solutions and identify new packaging print applications.

A best practice programme will run alongside flexo 2005 and will take place on the exhibition floor as an integral part of the event. Seminars will focus on how companies can get the best performance from their flexographic printing presses.

Asahi Photoproducts Ltd.

A main attraction from Asahi Photoproducts Ltd. will be AFP-DHS digital material for printing films, paper and board and APR liquid plate-making products. Addressing the quality issue surrounding liquid plate production versus sheet, the company will demonstrate its F400 resin.

ANI Printing Inks

ANI Printing Inks will feature Flexocure Ivory, a new UV Flexo system claimed to have increased opacity to challenge UV screen printing. Also on show will be CombiWhite an over-printable and Opaque Screen White ink and HolographINk, a speciality imaging process that provides eye-catching holographic effects.

Applied Laser Engineering Ltd.

Applied Laser Engineering Ltd. will exhibit an extensive range of laser engraving machines for printing, coating, etching and surface treatment applications.

CFM Ltd.

CFM Ltd., in association with Swedev AB and FlexoArt AB, will exhibit the latest new developments in Swedcut and coated MikroKote ll doctor blades.

Cheshire Engraving

Cheshire Engraving is showing its range of ceramic and chrome plated Anilox rollers. The company's improved channel link and double helix screens will feature along with a range of Anilox cleaners. Also on show will be Cheshire's specially developed new Ultrasonic Anilox cleaning system, Flexonic, that is fully automatic with coarse and fine screen settings.

Esko Graphics

Esko-Graphics will feature the CDI (Cyrel Digital Imager) family and demonstrate its Scope workflow environment covering a wide range of functions, from job and product specification, through graphic and structural design and expert pre-production operations, to platemaking for printing and toolmaking for converting.

Flexo Wash

Innovations on show from Flexo Wash will include the SL1500 fully automatic cleaner for plate sleeves and the FW3000 system for cleaning Anilox rolls.

Focus Label Machinery Ltd.

On show from Focus Label Machinery Ltd. is the Proflex compact, in-line flexo press. The new press incorporates Rapid Change Print Cartridges, automatic plate throw off, constant rotating anilox rolls and a new inter-station drying system that enables higher press speeds. The latest version of its Centraflex CI press along with Platemate Video plate mounting system and Compact Profile for flexo plate making will also be exhibited.

GEW (EC) Ltd.

GEW (EC) Ltd. will launch e-Brick, a space saving electronic power supply claimed to have less than 30 per cent of the volume and 20 per cent of the weight of conventional systems with increased UV output of 10 per cent. The 3-phase input, balanced under all running conditions, and high power factor can result in up to 30 per cent less energy consumption.

Also on show will be JetCure, a small, compact UV lamp head for ink jet printing offered in both shutterless and shuttered designs; the VCP Film for heat sensitive substrates; NUVAplus NP for wider web applications and NUVAplus N2, a modified atmosphere curing system for faster curing of free radical silicone release coated liners and reduced photoinitiator inks for food packaging applications.

Litho Supplies

The latest products from Creo, Macdermid Printing Solutions and Xerox will be featured on the Litho Supplies stand.

MPH Ltd.

MPH Ltd. origination and pre-press services include CDI plate imaging and "Fast" thermal processing, Gallus and Stork rotary screen production as well as "WebFlow" artwork communication and databasing will be featured

Alphasonics AS1000 parts washing system

Nilpeter Limited

Nilpeter Limited will exhibit an FA-3300 flexographic printing press for label and flexible packaging production. Available with a full range of processing options, the FA-3300 flexographic printing units can be converted tool-free into screen-printing units with the Nilpeter Drop-In screen cassette. Conventional flexo plates can be used together with sleeve technology for easy plate handling, seamless printing and instant register.

Pamarco Global Graphics

Pamarco Global Graphics will demonstrate their total print solution packages including anilox, repro and plates, Care cleaning solutions, tapes and proofers.

RK Print Coat Instruments Ltd.

RK Print Coat Instruments Ltd. will show a new version of the Flexiproof 100. The new version with integrated UV is a multi-tasking bench top system ideal for manufacturers of inks, adhesives, substrates, anilox and doctor blades as well as printers and converters.

Sericol

Sericol will launch Flexo JD, a new set of UV flexo inks from its Uvivid range designed to offer solutions for the narrow web label and flexible packaging markets.

Tectonic International

On show from Tectonic International is the latest in its range of web inspection systems. Jaguar features passive and active inspection and colour monitoring, job history. It downloads required statistics taken on-the-fly and incorporates on-line or off-line information storage through any remote PC or by use of the factory SPC system. ■

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*SOLJET PRO II V SC-545 and VersaCAMM SP-540 max. cut width is 53". VersaCAMM SP-300 max. cutting width is 30".

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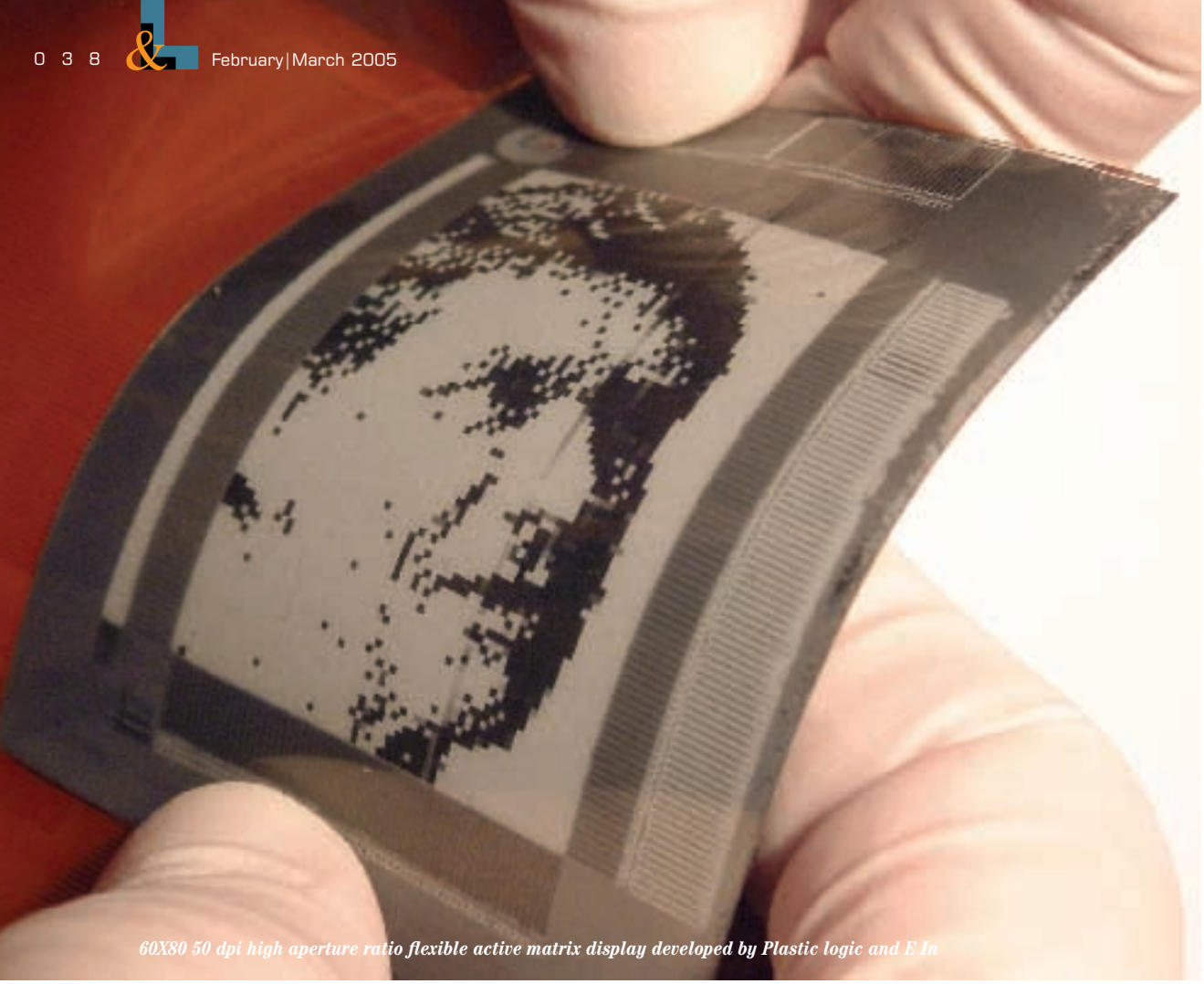

60X80 50 dpi high aperture ratio flexible active matrix display developed by Plastic logic and E In

Printed electronics – the future of your business?

From printed RFID antennae to nano-scale flexography and electronic paper, the 3rd Annual Printable Electronics and Displays conference gave a fascinating insight into possible technology futures. **Katy Wight** reports

The flirtation between the scientific electronics world and the artisan printing industry has evolved into an unlikely marriage. When the two disciplines collided at the 3rd Annual Printable Electronics and Displays conference in Las Vegas, the disparities between the two industries were bold. But the union is at the forefront of some of the most exciting technology emerging in both markets.

The conference, organized by the Information Management Institute (IMI), has a legacy in inkjet technology, but other printing techniques have been keen to promote their abilities to the electronics industry. With printed antenna for RFID tagging reputed to be on the verge of a market explosion, flexo and offset were also prominent. The Wal-Mart and US Department of Defence mandates mean that RFID is what everyone's talking about right now.

Despite being the current epicenter of the label converting landscape, RFID, conductive inks and printed antenna are just the tip of the printed electronics iceberg. The rest of the conference was like a glance into the electronic future.

The technique is for printers to manufacture displays that are composed of one or more layers of ink on a succession of substrates. The premise of printable electronics is that if you can print all of the components of a circuit – conductivity, capacitors, semi-conductivity, adapted di-electric properties, transistors, power and intelligence via a chip or supplemental electronics – as a layered, integrated circuit, then you will have a

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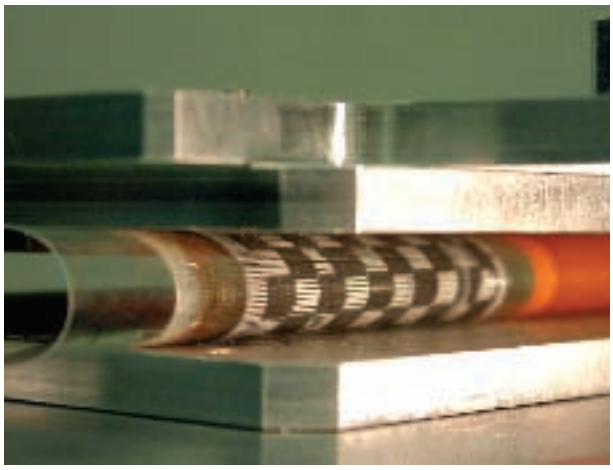

(Left) The flexible active matrix display, developed by E-Ink and Plastic logistic has a curvature radius of 5mm

lower cost alternative to the IC.

Dr Charles Bauer, senior managing director of TechLead Corporation, presented a paper which analyzed opportunities for printable electronics, beginning by identifying drivers in the electronics industry.

'As a driver of the semi-conductor industry, PC sales have become less and less important,' he says, 'and communications is now taking a much larger share. The Internet means that the electronics industry is now dominated by communications and data storage. We want portable peripherals. The new electronics industry drivers are to make a product that is smaller, lighter, faster, smarter, cheaper and more reliable.'

Bauer suggests that the solution is low cost components and an overall product that is thinner, smarter and faster. Printable electronics fits the bill, offering a 'lower system cost, product miniaturization, straightforward product architecture and easy product upgrade,' he says.

'Lots of these solutions are already available, but the challenge lies in cost-effective deployment. We need the tools to find out the costs early on – cost is the ultimate decision maker, and hopefully we are close to the big bang.'

The achievements of several companies are bringing us closer to that big bang. E Ink, a company borne out of MIT in Cambridge, MA, has achieved a significant milestone in the printed electronics industry. It has developed a proprietary material that is processed into a film for integration into electronic displays. The principal components of electronic ink are millions of tiny microcapsules, about the diameter of a human hair. Each microcapsule contains positively charged white particles and negatively charged black particles suspended in a clear fluid. When a negative electric field is applied, the white particles move to the top of the microcapsule where they become visible to the user. This makes the surface appear white at that spot. At the same time, an opposite electric field pulls the black particles to the bottom of the microcapsules where they are hidden. By reversing this process, the black particles appear at the top of the capsule, which now makes the surface appear dark at that spot.

To form an E Ink electronic display, the ink is printed onto a sheet of plastic film that is laminated to a layer of circuitry. The circuitry forms a pattern of pixels that can then be controlled by a display driver. These microcapsules are suspended in a liquid carrier medium allowing them to be printed using existing screen printing processes onto virtually any surface, including glass, plastic, fabric and even paper.

Add-Vision, Scotts Valley, California, is a company that is successfully manufacturing low cost, screen-printed light-emitting display systems. The company initially focused on creating light-emitting displays using thick film inorganic, alternating current phosphor electro-luminescence (ACPEL or EL for short) technologies. This technology, used in products such as Indiglo watches, has been limited by its high operating voltages, limited operating lifetimes, limited color range and relatively low brightness. Add-Vision recognized the significant advantages that light emitting polymers (LEP – also know as organic OLED) would have over ACPEL technology. LEP has low operating voltage requirements, inexpensive driver electronics, moderate lifetime, a full RGB color range and is visible under daylight conditions. These benefits open up the door to a wide range of technologies and applications that are not feasible using the ACPEL technology. For the past two years, Add-Vision has exclusively focused on screen-printed light emitting displays, enabling the commercial viability of LEP for many large vertical markets including point-of-purchase (POP) displays, gaming and vending machines, electronic signage, and toys.

While high-end electronic displays represent a multi-billion dollar market opportunity, the LEP (or OLED) industry has overlooked the equally robust market for lower-cost, temporary, low usage or disposable electronic displays. Add-Vision has focused on commercializing LEP technologies for screen-printable, low-end displays. By screen-printing the entire LEP device (all layers) in an open air, non-clean room environment, LEP displays can be manufactured in low-cost printing operations to create unique products that are well-suited to the existing capabilities of LEP technology. Because of the ability to leverage existing traditional printing equipment and operations, the Add-Vision technology can be quickly used to penetrate large, existing market opportunities.

Sony launched the e-Book, LIBRIé, in Japan in April 2004, in conjunction with E Ink and Philips. Heralded as the world's first consumer application of an electronic paper display module, it claimed to offer a truly paper-like reading experience with contrast that is the same as newsprint.

The Electronic Paper Display is reflective and can be easily read in bright sunlight or dimly lit environments while being able to be seen at virtually any angle - just like paper. Its black and white ink-on-paper look has a resolution in excess of most portable devices at approximately 170 pixels per inch (PPI) and because the display uses power only when an image is changed, a user can read more than 10,000 pages before the four AAA Alkaline batteries need to be replaced. However, it is fragile and inflexible, and its incompatibility with common formats such as pdf was said to hold sales back.

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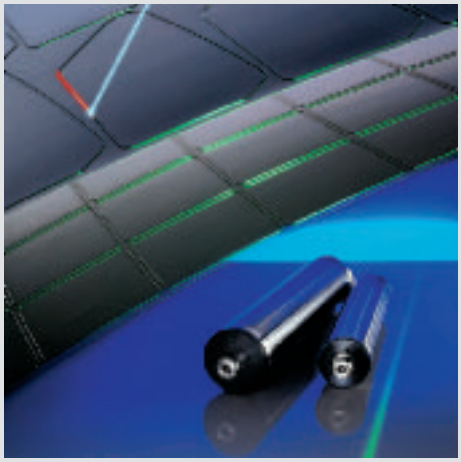

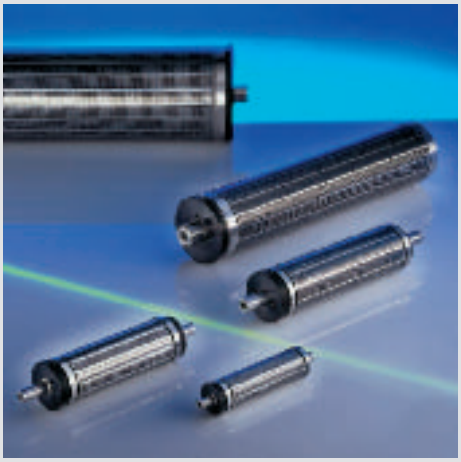

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Philips, Sony and E Ink launch the world's first consumer application of an electronic paper display module in Sony's new e-Book reader, LIBRIé

At the beginning of December E Ink announced a non-exclusive agreement to co-operate on the design and fabrication of flexible all-plastic electronic displays with Plastic Logic Ltd of Cambridge, UK. Plastic Logic develops printed flexible thin film transistor (TFT) arrays and the two companies are planning to combine their technologies to produce high-resolution active-matrix displays suitable for a range of applications from smart cards and cell phones to wireless electronic readers, such as e-books, e-maps and e-newspapers.

The liquid crystal active-matrix displays (AM-LCDs) that are commercially available today are produced with two sheets of heavy, fragile glass that can break when dropped. In contrast, the E Ink and Plastic Logic displays are flexible, thin, light-weight, bright, high contrast and shatterproof.

Dr John Mills, VP Engineering for Plastic Logic discussed how the company had recently signed two significant deals to produce flexible paper displays for mobile peripherals and flexible X-ray arrays for use in hospitals. Using inkjet technology and laser patterning, Mills says that Plastic Logic was able to achieve TFTs of a 'reasonable performance'.

'If the TFT has a mobility of 0.1, we are still 5,000 away from a single transistor that you would find in your Pentium processor,' he says. 'The market for printable electronics has to be an area where silicone can't compete. But the electronics need to be as reliable as silicone or it's not going to work. Flexibility is what separates plastics and polymers.'

Nano-technology

Some of the less mature, but most groundbreaking projects in the printed electronics sphere involve nano-technology.

A nano-meter is one billionth of a meter, or roughly 75,000 times smaller than the width of a human hair, says Professor Kleper of RIT. 'At the nanometer size scale materials take on dramatically new electronic, optical, magnetic and interfacial properties.'

Many of the unique properties of nanostructures arise at sizes for which traditional fabrication processes, such as those used in semiconductor manufacturing, are either impractical or not possible using today's technologies, as Dan Lawrence, director of technology and commercialization, Precisia, discussed in his paper on the transition of graphic flexo to printing nano-scale structures.

'We want to bridge the gap with our colleagues in the integrated circuit board side. Academic and other research suggests that in principal it is adaptable for sub-micron structures,' he says. 'But, when printing flexo there is roughly a 44 micron increase in what we intended to print from the plate and what we get on the page and we need data thresholds. It's suggested that we can get down to 50 nanometers, but at the moment we are printing about 50 microns.'

One of the most limiting factors of what's available today, is that there isn't a press capable of measuring nanometers and dealing with registration at that scale. A thickness gap of +/- micron in flexo is equivalent to 10s of nanometers – a big issue when printing multiple layers of a circuit.

Chuck Edwards, general manager, Printable Electronics and Displays, Cabot Corporation, explained how it screen-printed nano-particle silver ink to 25 microns, but has started to experiment with a SpectraSE inkjet printhead and believes that it will be able to print a line of thickness <0.2 microns.

Dr Linda Creagh, business development director for Spectra Inc, says that beyond precision printing, inkjet has other advantages as it is 'non-contact printing which means that it is not contaminating when you are using expensive materials. She is researching the benefits of a silicone MEMS fabrication over a standard nickel nozzle, which she claims can have a trajectory error up to five microns (standard deviation of 1.0mr).

'With a silicone nozzle, the standard deviation drops to 0.5mr and a trajectory error up to three micron, therefore straightness is better. It is more precise and more consistent,' she says.

Dr John Attard, business development manager, organic semi-conductors, Xaar Plc, described how his company is currently developing the Sideshooter3, where the core idea is based around 'sheer mode, shared wall' technology in the print head. The walls flex in and out towards each other, forcing out the inks, as opposed to pumping the roof of the head. As a result, you have fine control over final drop size.

Dr Bernard Schleich of Degussa AG discussed the establishment of its Nanotronics center and the development of nano-silicone ink as a printable inorganic semi-conductor.

'It is measured, but we aren't putting it into any devices yet,' he says. 'We see a timescale of three to five years.'

Dr Masaaki Oda, manager, nanoparticle application department, ULVAC Corporation presented his branded nanometalink for inkjet and nanopaste for screen printing, claiming that their prices were becoming very competitive. The ink is made from individually-dispersed silver nano-particles formed by gas evaporation.

At TLMI's 27th Annual Awards ceremony, Graphic Solutions International was given a special 'innovator' award for its 1.5 Volt printed battery. It marked a departure from the traditional realms of tag and label converting, and was a reminder that OLEDs, TFTs and nano-particles may feel far removed from your business now - but they could be central to your future. ■

PDF verification: the sequel

Following the previous issue's report on Certified PDF technology, we examine further developments, including Adobe's groundbreaking Acrobat v. 7. Report by **Barry Hunt**

Portable Document Format (PDF) files are now the de facto method of transferring and exchanging data within packaging pre-press workflows. Their usage took off with the releases of PDF 1.4 and 1.5, which together overcame key technical issues, including object trapping and accurate CMYK and spotcolor management. Today PDFs perform a central role in workflow systems, principally from Agfa, Artwork Systems, Creo and Esko-Graphics.

Nevertheless, the creation of conventional PDF files needs care to ensure they print properly. In his article 'Verifying PDFs' (Issue 6, pp 43-45), Andy Thomas described the Certified PDF concept developed by Enfocus Software – a division of Artwork Systems – which interestingly claims to guarantee the integrity of PDF files before printing on the target press. Helping to reduce the time wasted on correcting and verifying information among all concerned is critical to meeting tighter deadlines for jobs involving shorter runs of multiple product variants.

Interestingly, Certified PDFs are among a growing list of graphics-related PDF software developments in the USA and Europe. For example, Global Graphics offers PostScript-to-PDF conversion tools in its Jaws PDF Creator, Server and Courier series. The PDF creation technology in QuarkXPress is based on the company's PDF technology. In early January, Adobe Systems began shipping Acrobat version 7.0 Professional with improved graphic features.

To place things in context, it's worth examining the role of pre-flighting. Specialized software can pinpoint problems, such as missing fonts or pictures supplied at the wrong resolution, before they become expensive production problems. Creative types can avoid many problems by pre-flighting native files, such as QuarkXPress or Adobe InDesign, prior to sending them to the printer or customer.

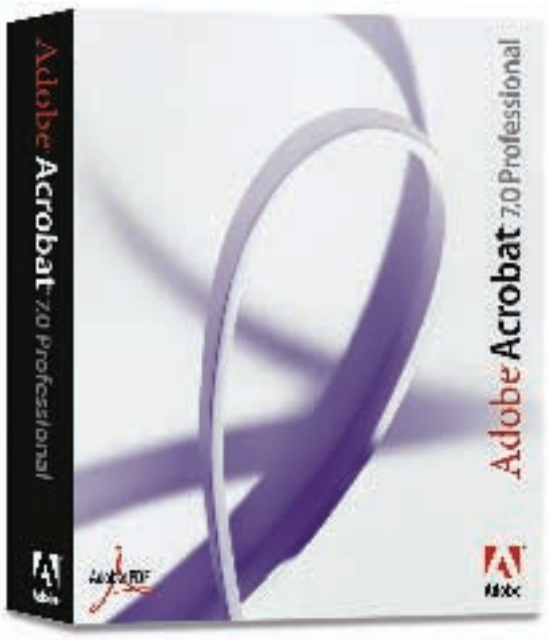
Not surprisingly pre-flighting works best when all parties use similar tools that operate within a set of rules to create standard profiles. This has prompted co-operation among international trade associations who deal with specific printing industry sectors.

Since June 2002 the Ghent PDF Workgroup (www.ghentpdfworkgroup.org) has streamlined the work done by over 15 industry organizations in establishing pre-flight profiles and output settings for Adobe Acrobat Distiller, Adobe InDesign and QuarkXPress output settings. Originally it was set up to develop and maintain Certified PDF Quality Standards for publishers and commercial printers. Last year it formed a Packaging Subcommittee to study and evaluate the implementation of full PDF workflows in this sector. The aim is to establish generic settings, rules, guidelines, workflows within a framework that defines PDF as 'the ultimate exchangeable file format for the packaging industry, based on industry standards and market demands and needs'.

They recognize these guidelines and settings should be suitable for the entire design and print workflow and cover all printing processes. The committee's members represent over 30 companies in Europe and the USA, including a few large brand owners such as Nestlé, L'Oréal, Kraft, Sara Lee Foods and Brach's Confections.

The Ghent PDF Workgroup will also define how applications that create and read PDF/X files should behave in order to create digital content files that print properly. In effect PDF/X files form an ISO standard for graphic arts file exchange, with subsets that are finely focused on specific print applications. Certainly some overall order is needed, not least with third-party pre-flight tools and plug-ins.

Besides being incorporated in specialized workflow systems, several pre-press vendors market their own applications for use by print buyers, design studios, repro houses and printers. Enfocus Software, for example, offers PitStop Professional as a pre-flight, auto-correction and editing tool for PDF and PDF/X graphics files, also PitStop Server for handling a large number of PDF documents. Markzware Software recently launched FlightCheck Studio, which uses design specifications based on rules called 'Design Policies'. A password-protected Design



"Correction tools for the creatively-based Acrobat 7.0 Professional version, include RGB color, transparency, hairlines and printers' marks. An output preview tool allows users to see any output errors on screen"

Policy is saved as a file for distribution to any number of designers or customers. It ensures specific fonts, spot colors, images and style rules comply with the scheme at the creation stage and allows the correction of any errors. Also new is StayReady, a program for former users of the Extensis PrintReady on-line pre-flight service that ceased at the end of 2004. It will allow them to migrate to FlightCheck Online, which is available as a locally-installed server or as a hosted, subscription-based system.

This so-called 'full commentating functionality' is present in Adobe System's mould-breaking Acrobat 7.0. Subject to agreed user rights, anyone using the free Acrobat Reader v.6x or 7.0 (now available for downloading) can review and mark-up proofs, layouts or other PDF documents. Correction tools for the creatively-based Acrobat 7.0 Professional version, as opposed to the commercial regular version, include RGB color, transparency, hairlines and printers' marks. An output preview tool allows users to see any output errors on screen, including CMYK black, ink coverage limits and separation previews. Launch speeds are considerably faster for both Mac and Windows platforms compared with the Acrobat 6 Pro family.

When integrated with Adobe Creative Suite Premium 1.3, users can transform print and cross-media workflows by selecting the appropriate tools. They include Adobe Photoshop CS, Adobe Illustrator CS, Adobe InDesign CS, Adobe GoLive CS, and Adobe

Some basic facts about PDFs

- As a standard exchange format, Portable Document Format files have usurped Adobe's PostScript 3 as the leading cross-platform file format and removed most device-independent issues within pre-press workflows.
- The first Adobe Acrobat with PDF appeared in June 1993.
- Before PDFs, file filters were needed to convert proprietary file formats and PostScript files for label and packaging design.
- PDFs are read through the freely-available Acrobat Reader tool from Adobe Systems. Separate paid-for Acrobat software is needed to create and edit PDFs for documents and multi-media presentations.
- PDFs were initially intended as a file format used in various levels of document creation and printing.
- A major advantage was an ability to magnify a PDF document up to 800 per cent without losing clarity of text or graphics. PDFs also allowed sharp, color-precise printing on almost all types of printers.
- Viewed on screen, the files offer a precise color match regardless of the monitor used.
- This feature attracted graphic designers who could also save files natively from almost any standard layout or design application on either Macintosh or MS Windows platforms.
- PDF file management is now an essential element within local or globalized digital proofing applications. Users can transmit approved master images to global printing sites.
- PDF files share many of the same characteristics as HTML documents to allowing viewing within popular web browsers
- Many state and local governments around the world have begun to mandate PDF as a standard for delivering electronic documents.
- Adobe Systems says just over nine per cent of the web's content comprises PDF files: 20 million are available for download.

Version Cue. Registered users of Acrobat Standard versions and Acrobat 6.0 Professional can upgrade to Acrobat 7.0 Professional (the standard version handles ordinary document files). Users of Adobe Photoshop can upgrade to Adobe Creative Suite Premium 1.3 for Mac and MS Windows (www.adobe.com has details of availability, pricing and support policies in various countries). The new platform also allows internet-enabled access to Yahoo Search, as well as formatting for e-mails and attachments. Acrobat 7.0 Professional requires Macintosh OS X v.10.2.8 or 10.3, a PowerPC G3, G4 or G5 processor and at least 128 MB of RAM (256 MB recommended). It also runs with Windows 2000, XP Professional, XP Home or Tablet PC Edition with an Intel Pentium-class processor. In fact the specifications favor commercial Microsoft Windows users rather than Mac users, still less those in the PDF pre-press world. For example, users can export comments in a PDF document to Word 2002 and 2003 files from which the PDF was created, but not with the Mac OS version. Acrobat Elements also remains a Windows-only product. Since label and packaging applications are probably at the outer limit of PDF technology, Enfocus's Certified PDF appears to remain the first port of call for creative professionals. Other third-party plug-ins, such as pre-flight tools, should also retain their tailor-made advantages in this sector. But if it shows its document-based pedigree, Acrobat 7.0 Professional does have some useful print production tools, such as Ink Manager from Adobe InDesign to re-map spot colors or convert RGB to CMYK. There is also support for PDF/X graphic files and Job Definition Formats. As an industry-standard file format, JDF is intended to streamline information exchange between different applications and systems. Version 1.3 is still under development by the industry members of CIP4, but Adobe's support for it in Acrobat 7 Professional introduces an interesting scenario because designers and print customers will be able to create a JDF file with each PDF.

'As happened with advertising PDF for magazines, this customer pressure may encourage print companies to set up training and workflow systems to make it work,' says Will Pollard, researcher at Adobe Systems. 'Some printers still think of JDF as far off in the future. Once Acrobat 7 is released there will be about 16 million desktops capable of creating a specification as a JDF file. Once people understand this there will be an expectation that print companies are set up to respond'.

Allowing designers and customers free access to a workflow's data files obviously requires some thought. At the very least they must understand the basics of pre-

"Although biased towards PC-based document management software, Adobe Systems could still present a wild card if it ever decided to pile even more pre-press functionality into a future Acrobat 8.0 Pro family"

flight techniques. Audit trails of the type present with Certified PDFs are therefore a powerful feature if they can show a file's history from design to finished production. Ideally, this facility automatically logs changes and their times to allow instant checks at any point in the production cycle. It is especially useful when transferring data related to multi-lingual packaging and labels, perhaps involving production in different countries and where PDF files make up the majority of first-time proofs.

Internet-based facilities that allow designers and printers to exchange and work with the same specified PDF files to guide the entire creation and preflight processes are sure to become standard features. Enfocus, for example, offers Certified PDF.net, which allows subscribed users to publish their own specifications as PDF Queues. It says that designers who have installed the latest Instant PDF 3.0 on their workstations can download the printer's PDF specifications to seamlessly guide the entire PDF creation and preflight process through to pre-press and beyond.

- In a similar vein, Creo has updated Synapse InSite 4.0 for the Prinergy workflow to make it easier for customers and creators – either as part of groups or freelances – to view, annotate and approve jobs. Interestingly, since the 'Verifying PDFs' article was published, Artwork Systems announced plans to integrate Enfocus even more closely within the group. It will pull the respective R & D departments together to develop workflow tools at group headquarters in Ghent, Belgium.
- The general aim is to make Certified PDF a core technology. It is already integrated in the latest ArtPro version 8.0 and Nexus workflow system. While it has yet to reach an industry-standard status, Artwork considers it is an important value-added for conventional PDFs. Current examples of OEM usage include Agfa, which incorporates Certified PDF in the various Apogee pre-press systems, including ApogeeX Create Pro for creating PDF files for internal or remote processing. Creo is another major OEM user: Prinergy Powerpack and Prinergy Evo for packaging include Certified PDF packages.
- They are also found in commercial workflow systems from Electronics for Imaging, Fujifilm, Global Graphics, Heidelberg, Xerox and Screen Europe. Although biased towards PC-based document management software, Adobe Systems could still present a wild card if it ever decided to pile even more pre-press functionality into a future Acrobat 8.0 Pro family. ■

Faster and wider

The greater productivity offered by wider and faster narrow web presses has led LTI Inc to add two Mark Andy LP3000s to its press battery

Leroy Baker, President and Founder of LTI, Inc., a Burlington, NC-based label company, has the same concerns as most narrow web converters when it comes to product quality, press speed and turnaround times.

The company has looked to solve its productivity concerns by installing wider and faster presses, choosing two Mark Andy LP3000 machines for its 17,000-square-foot facility to handle the bulk of its four-color process work.

Baker says he bought the two 13-in. and 17-in., 8-color LP3000s to complement his existing Mark Andy 2200 presses, all of which he bought within a year of launching his company in 1996. His first 2000 press, a 13-in., 8-color model, was soon followed by three more: a 7-in., eight-color UV press, and two 13-in., eight-color presses.

'The 2200 is just a nice overall press,' explains Baker. 'It does a good job. But our newest 2200, with the helical gears, runs 100 to 125 fpm faster than our other 2200s, and everybody that comes in here says it just runs so quiet. It's a real sturdy press and a real workhorse.'

Baker said LTI became a Mark Andy house because of his experience with the presses during his nearly 40 years in the printing industry before starting his own label company, founded as Labels, Tags & Inserts, Inc. While working for another converter in 1972, he visited the Mark Andy headquarters and bought that company's first 10-in. Mark Andy press.

'When I left there in 1974 and started making printing plates, I worked with all kinds of presses,' explains Baker. 'And overall, I liked the Mark Andy best because there were better adjustments on the printing plates. Because of that experience, I feel like I got a lot of people started with Mark Andy's. So when I was ready to get back into printing, I knew what I was going to get. I liked the 13-in. Mark Andy, so we just started ordering 13-in. printing cylinders, and now we can move all the 7-in. work over to the 13-in press.'

But it was the installation of the two LP3000's — with their wide widths, faster speed and partial UV capabilities — that

"We do a lot of trade work. Other printers know that we're going to do quality work. If they have something that's too hard, or even something that they're just a little wary of, they will send it to us"

Baker feels will allow LTI to better serve its existing customers and attract others who require quick turnaround on multi-million label runs.

'We had a pretty big label buyer that we used to run very little for who said he's going to move all of his work back into town,' says Baker. 'As a direct result of LTI's installation of the LP3000's. We're taking the jobs that he had at other printing companies and doing them here now, because we can turn things around so quickly now. We're offering great, great quality, and we're dependable.'

'We really wanted equipment that had helical gears for the better quality, because that's what people are looking for today for just about any kind of little label,' notes Baker. 'It doesn't matter how fast you can get it there it doesn't look good.'

The ability to provide consistent quality across all market niches is particularly important to LTI, which has no direct sales force. But then it really hasn't needed one. The company's growth has been built on a strong foundation of delivering outstanding quality and service, and perhaps an even stronger reputation for both. The only person more demanding than the customer is, perhaps, the customers' customer, and most of the work that keeps LTI's six Mark Andy presses running comes from brokers; a much smaller percentage is work completed for other printers as far as 600 miles away that don't have LTI's capabilities. Both brokers and printers rely on the family-run business to consistently deliver the quality demanded by their own customers.

'We built the company never having a sales force, but just by having our name out there for quality,' explains vice president Rhonda Katz, Baker's daughter. 'We do a lot of trade work. Other printers know that we're going to do quality work. If they have something that's too hard, or even something that they're just a little wary of, they will send it to us. We have a very fast turnaround – of seven days or less – and with us being a family business they get a lot of personal service, and they know that we're going to do what we say we're going to do.'

LTI's relatively recent installation of the LP3000s has hardly made its four Mark Andy 2200s obsolete. The presses feature the same quick change inking system as the LP3000, providing for faster set-up time and economical short runs. Quick 'Drop In' doctor blade stations complement the inking systems to deliver more consistent coverage and improved color control from run to run.

The versatility of its six Mark Andy presses also allows LTI to do extensive testing of new inks and materials for end users across all market segments. Using both the presses and its own in-house inking system, 'we're constantly testing this or testing that. When people have a new ink, and new plate or a new dot, they say, "Let's let LTI try it out on one of their presses." Because of all the areas that we're versed in, a lot of the salesmen/brokers that we deal with come to us because they know that we know all

Leroy Baker and Rhonda Katz

different aspects of printing.'

That emphasis on service is just one of the reasons that LTI remains popular with brokers and even other converters. Surprisingly, although Baker spent more than 35 years as a platemaker, LTI does no in-house platemaking, choosing instead to rely on outside experts. Perhaps not surprisingly, one of those vendors is the company that he founded and later sold, Rotoplate.

'We let them keep that state-of-the-art prepress equipment,' she says of both of its plate suppliers. 'We get excellent service from them, so we're able to concentrate on the printing aspects of the business.'

The addition of the two LP3000s and their distinct capabilities has greatly enhanced the company's value to their customers. The 16-in. press has a UV gold hot stamping station. The expansion to a larger press also adds volume and versatility. In addition, the company recently added a re-register station to that press that is essentially a problem solver: allowing details or variable information to be added to an already finished label, or to overprint faulty bar codes or other initial printing problems.

"The expansion to a larger press also adds volume and versatility. In addition, the company recently added a re-register station to that press that is essentially a problem solver"

That has meant a lot to both their brokers and fellow converters, who rely on LTI to enhance the product offering they bring to their own customers. Much in the same way that LTI sees enhanced capabilities at Rotoplate as an opportunity to offer more to its own customers, brokers and other printers see additions to LTI's converting capabilities as enhancements to their own.

'We've had companies come in to our plant and say to their sales people: "You have to listen to these people because they have some more doors open for us,'' says Katz. "And the salespeople will say, "Oh, my gosh, I've been turning this work down, and now I don't have to." So that helps.'

Katz notes, however, that installation of the high-performance presses does have one downside: 'To be honest with you, now with us running these two 3000s at their speeds, we need more work,' she says with a laugh.

But with these new presses in-house, Leroy Baker figures he'll have little trouble attracting it. ■

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Shuttleworth rolls out labels MIS

As margins tighten in the label converting sector, pressure is growing to understand the true costs of the narrow web operation and drive efficiencies through the business. **Andy Thomas** reports on a new MIS system dedicated to label converters

Management Information Systems (MIS) specialist Shuttleworth has made a major move from the commercial print sector into the narrow web market with the roll-out of an MIS system dedicated to label converters.

The acquisitions first of Jenem and then of Compass Business Systems have given Shuttleworth dedicated labels expertise and a significant base of users, which is now being aggressively expanded. The Compass MIS in particular was a dedicated system for labels converters with functionality including cylinder and die handling, and this formed a central plank in the development of the new program, which built heavily upon the expertise gained by Shuttleworth in the commercial print market.

Scott Marienthal, Shuttleworth's marketing manager, stresses that the company's labels MIS is not simply a sheetfed package modified for labels, but a bespoke system built from the ground up with the complex requirements of label converters in mind. Continuing input is received from a user group consisting of Jenem and Compass systems users.

The 32 bit Microsoft compliant MIS package is built around user-defined templates from the estimating module onwards. Every template can be different but all feed off an integrated database of customers, suppliers, cutters, cylinders, materials and machines.

The raw stock control module again shows how the Shuttleworth Label System has taken note of the dedicated requirements of label converters, covering all raw materials including papers, plastics, consumables, ink, cores and adhesives. Warnings of low stock levels are created at the point of raising the job.

Cost control is a central feature of successful converting operations, and the program flags any additional costs which may be passed on to the customer or absorbed. Agreed extras can be confirmed immediately with details of dates, times and authorisation.

With the critical importance of the internet in opening up communications, the sales ordering function can be opened up to end user customers through the Globetrader e-commerce module. Indeed, a wide range of web enabled functionality is included in the package, including on-line soft proofing, web reporting and remote access for sales teams on the road.

> "A wide range of web enabled functionality is included in the package, including on-line soft proofing, web reporting and remote access for sales teams on the road"

The graphical planning board shows most heavily the influence of Shuttleworth's extensive commercial print experience, offering an intuitive means of managing work in progress. Schedules are automatically updated from Shop Floor Data Collection with late jobs pinpointed.

The Shuttleworth Label System is linked to the Access Dimensions Lite accounting package, making live credit control data available to estimators and customer services staff, and there are extensive reporting functions with direct export to the web or MS Excel.

Applications

Tamar Labels

Tamar Labels, based in Tavistock, Devon in the UK, was the first label converter to install a full Shuttleworth Label MIS System after it identified that the label cutter management system it was using required further updating.

Tamar Labels managing director Alan Jones says: 'We were

using an in-house developed system using Microsoft Access databases. This had served us well, but Shuttleworth was the only company that listened to us and was able to demonstrate that it could provide the right solution for our needs. What impressed me was the system's established business logic that offers customization tools for almost any given application. This means that we can rely upon its proven relational database, but still personalise routes through the system to suit our own individual business needs, and it was this flexibility that we were looking for.'

Jones views the Shuttleworth Sales Order Processing (SOP) module as the key to unlocking his company's future development. This is a finished goods system that offers a concise view of stock quantities held, value, batch details and costs, selling prices, owners, orders and visual images of the products in stock. Here, sales orders can be processed quickly and accurately with immediate notification of stock issue, purchase and production requirements.

'The MIS allows us to characterise tools by size, gear, substrate, type of cut etc, and then they can be categorised into a system. We have set up parameters which cut out 90 per cent of the mistakes that typically occur in the haste of estimating , such as buying materials wider than the press. By monitoring what we do, we can compare the actual with the estimates on each job, so we know straight away whether we have made a loss or done well on a job rather than having to wait 12 months for the annual accounts.'

Basing the MIS installation around the Sales Order Processing Module means that Tamar can now print for stock and customers will eventually be able to order on-line using Shuttleworth's Globetrader e-commerce module. The MIS system has the facility to give each customer access to their own private areas with individual pricing plans and lists of their stock.

The MIS allows Jones to model processes and products on the recently acquired HP Indigo ws 4000 digital press. 'Because the press is so predictable, we know the cost per color and know how much material we use. And this is where the MIS will pay for itself, when it can enable us to see where we should be investing further.'

Jones believes converters too often buy MIS as an afterthought but with massive expectations, and do not give the time or resources to implement it properly. 'This happens because they are not sure what they want it to do.'

Jones feels strongly that the value of MIS packages is undervalued. Some members of the British Short Run Label Association, for example – of which Tamar is a member – are claiming that systems on the market dedicated to label converters are too expensive and one could be written to be a lot cheaper. 'But this depends on what you want it to do. I'm sure I could build cheaper presses, but I'm a printer. If we want the best tools then we must pay for companies' R&D and ongoing support and upgrades. Our investment is no more expensive than investing in a person's salary on an annual basis, but how many people's work does it do? We're not going to lose anybody because of it, but we won't have to employ people to move paper.

Alan Jones, md Tamar Labels

"The time spent managing buying day to day has been reduced from 60-70 per cent to 30-40 per cent and the rest of the time our people spend looking after customers and looking for new customers"

The time spent managing buying day to day has been reduced from 60-70 per cent to 30-40 per cent and the rest of the time our people spend looking after customers and looking for new customers.'

Jones says his company's growth relies upon Shuttleworth's growth and continued support. 'We are in partnership together and this is how I see our relationship with MIS developing. It's not simply an add-on to our business; it is an integral part of our company.'

Jones was particularly impressed by Shuttleworth's open attitude to his suggestions for modifications and improvements, which were quickly implemented.

'We made suggestions for improving cutter handling. Scott took time out to listen to what we said and that relationship is ongoing. It's not like buying something out of a box. It is a mistake which is often made, treating MIS like an IT system and not as something that's going to run your business.'

Jones stresses that the relationship with an MIS supplier has to be a two way process. 'They can only be as good as the information you give them. You can't expect something this complex to work out of the box. They do have experts who understand our business and we don't have to deal with some help desk'

Jones says it is essential when implementing an MIS system to get buy-in from the workforce. 'There will always be some

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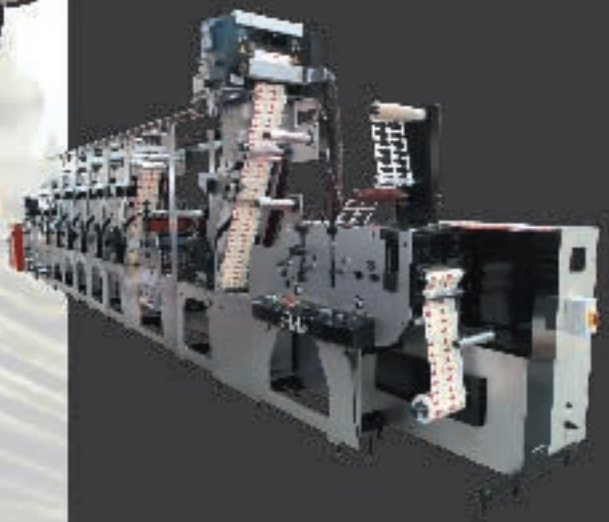

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resistance to new ways of working, and the clearest path to success is to demonstrate that it works and is no more effort than what they were doing before. '

Another word of advice from Jones is to phase the system in step by step to ensure it is fully understood.

The results have been impressive. 'The Shuttleworth MIS has revolutionised our operation, given us more forward vision and flattened the peaks and troughs . It allows us to step back from worrying about stock levels and allocation to jobs and take a more strategic view.'

Multi Labels

Multi Labels, based in Daventry in the UK has invested in a 10-user Shuttleworth Label System as part of its £1m expansion drive. The company is planning to use its MIS to move the business forward into a new freehold 12,000 sq ft factory, purpose-built to British Retail Consortium (BRC) accreditation standards.

Family owned, Multi Labels has a turnover in excess of £2m, and is currently experiencing rapid growth, with 2004 sales up 20 per cent. The MIS is seen as a vital component of this growth, bringing control throughout the business and facilitating the additional throughput of work without the need to recruit additional staff.

The comprehensive system covers Estimating, Sales & Marketing, Stock Control, Sales Order Processing, Purchasing, Production Planning, Shop Floor Data Collection, Costing and Invoicing. Multi Labels has rounded the system off with the incorporation of an Access Accounts package.

Multi Labels is also planning development of a new website which would enable its customers to order online using e-commerce software linked to its MIS.

In addition, Multi Labels is using Shuttleworth to support its entire IT infrastructure. Scott Marienthal, Shuttleworth's marketing manager says: 'Multi Labels had a mix of support channels for application software, operating systems, servers and PC's. It made sense to bring all of this under one support umbrella and, having spoken to some of our existing customers with similar plans, decided we had the resources and skills to do the job right.' ■

Tamar Labels has increased production efficency following MIS installation

RFID labels look set for staggering volume growth

Dr Peter Harrop of IDTechEx examines the current and forecast RFID label market to 2015 and highlights the opportunities for label converters looking to become part of the multi-billion volume RFID product labeling business of the future

In the past, RFID has been of little interest to most of the label industry and to all but a relatively small number of specialist label converters. Most RFID tags have been anything but labels. They have appeared as button shapes, nails, pendants, wristbands, smart cards and even boxes of electronics. The volumes have been rather lacklustre as well, with only 1.8 billion such tags having been delivered up to the end of 2004, prompting the jibe that it was "The oldest embryonic business in the world" because it attracted so much attention yet delivered so little.

Key volume applications for RFID technology to date have been in markets such as access cards for the financial, security and safety markets, or for the automotive and passenger transport sector, with smaller markets in leisure, libraries, laundry and healthcare.

Most of these tags had a silicon chip in them, making them clever but delicate and expensive in most cases. Sales of chipless tags however, have been relatively small when compared to sales of chip tags. Table 2 provides a breakdown of this split.

Table 1: Cumulative global sales of RFID chip vs chipless tags to end of 2004

Type	Cumulative global sales million	Highlights
Chip	1700	Cards Car clickers
Chipless	100	HID secure access cards, AstraZeneca labels on syringes
Total	**1800**	

Source IDTechEx

Another way of looking at the sales of RFID tags is to consider those that have a battery in them, called 'active tags' versus those without a battery, called 'passive tags'. Table 2 gives a breakdown of this split. Most of the active tags have a coin cell in them, otherwise called a button battery, and are not exactly suitable for reel to reel production.

Table 2: The cumulative global sales of RFID active vs passive tags

Type	Cumulative global sales	Highlight
Active	410	Car clickers
Passive	1390	Cards
Total	**1800**	

Source IDTechEx

Little interest in RFID labels in the past

Up to the year 2000, most label converters – other than the specialist companies already involved in niche label markets – were too busy with their own buoyant markets and had little interest in RFID or even the more successful Electronic Article Surveillance EAS market where sales had risen to six billion labels yearly, mostly made by companies outside the traditional labelling business such as Sensormatic, bought by Tyco, and Checkpoint. A primary reason for the success of EAS was a label price of only a few cents because no silicon chip was needed.

Hungry label converters now look at RFID takeoff

Few traditional label converters would describe their sectors as buoyant or profitable any more and, as they read increasing

Table 3: Forecast for global sales of RFID tags in billions 2005-2015

Number (bn)	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Item	0.5	0.9	3.0	5.5	9.8	27.0	53.0	295.0	430.0	676.0	1,000.0
Pallet/case	2.0	8.1	15.3	19.5	23.6	30.0	31.0	32.0	33.0	34.0	35.0
Other	0.4	0.8	1.8	3.4	4.5	5.7	6.8	7.7	8.9	10.4	12.5
Total	**2.9**	**9.8**	**20.1**	**28.4**	**37.9**	**62.7**	**90.8**	**334.7**	**471.9**	**720.4**	**1,047.5**

Source IDTechEx

numbers of articles and news items in the media – such as the volume orders being placed by Wal-Mart, Tesco and many other retail groups – they are waking up to the fact that RFID is suddenly taking off and looks set to grow rapidly over the next ten years. Table 3 shows a projection for RFID tag growth to 2015 from IDTechEx.

Other analysts such as Frost & Sullivan forecast figures of around 400 billion tags being sold in 2015 but, whichever way we turn, the experts are seeing a massive new market. Indeed deliveries and orders in 2004 were sharply up on the year before. Even if one wrongly considers the RFID tag to be nothing more than a barcode replacement, then such figures are not necessarily unrealistic, because there are somewhere between five and ten trillion barcodes printed in the world every year.

IDTechEx, Frost & Sullivan and others are only forecasting that the number of RFID tags will be a small proportion of the number of barcodes even in ten long years from now. Most observers doubt that these tags will reach the ten trillion level before 2020.

RFID becomes a label business

So far, so interesting, but how much of the future RFID requirement will be in the form of labels? The newly hungry labeling industry needs to know that. Few analysts have tried to estimate such percentages, though all agree that most will now be labels. IDTechEx has recently prepared the figures in tables 4 and 5.

Table 4: Percentage of RFID tags that are labels, by numbers made in 1990, 2000, 2005, 2015

1990	2000	2005	2015
5	13	87	99.5

Source IDTechEx

Table 5. Percentage of RFID tags that are labels, by value made in 1990, 2000, 2005, 2015

1990	2000	2005	2015
2	7	85.2	97.0

Source IDTechEx

As can be seen in the various tables, the projected volume growth for RFID tags is quite staggering, and almost all of that is in the form of labels – with item/product level tagging being a huge market that will need to be met by the label converter. Already retail giant Tesco has said that their suppliers will be required to begin tagging individual products delivered in reusable containers from April this year, with individual product tagging to follow soon after.

The only major market in terms of numbers of tags that may not be a label or label-like market will be the tagging of animals, notably livestock, with ear, hoof, stomach and flesh implant tags. However, even here the ear tag for four legged livestock and the leg tag for chickens – not yet a market – may end up rather like a miniature, ruggedised air baggage tag, i.e. suitable for making on label machinery. The worst case, from the point of view of the label industry would be that all animal tags and most of the sophisticated active tags will remain non-label. In this event, the penetration of labels still reaches 99.5 per cent by numbers and 97.0 per cent by value, in 2015, a slightly lower penetration by value because the non-label structures are nearly all more expensive.

The labeling industry will often be interested in label-like structures as well. For example, because of increased counterfeiting, RFID ribbon in banknotes is now being trialed. New legal requirements are leading to 400 million smart RFID passport pages being generated in the next few years and there is potential for one billion smart disposable tickets yearly in due course. None are labels but most may be made on label making equipment or something very similar. Table 6 puts figures to this.

Table 6: The market numbers in billions for RFID labels and label-like tags 2005-2015

No billion	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Label	2.4	9.5	19.36	27.13	36.25	60.59	88.26	331.7	468.05	715.65	1041.7
Label-like	0.06	0.20	0.62	1.13	1.45	1.71	2.04	2.40	3.15	3.95	4.8
Not labels and not label-like	0.4	0.8	1.8	3.4	4.5	5.7	6.8	7.7	8.9	10.4	12.5
Total	**2.9**	**9.8**	**20.1**	**28.4**	**37.9**	**62.7**	**90.8**	**334.7**	**471.9**	**720.4**	**1047.5**

Source IDTechEx

Nothing is forever

Despite this rosy picture, we would warn that nothing is forever. We believe there are lessons from barcodes and from EAS anti theft tags. Just as the only way that EAS came down in price was by avoiding use of the silicon chip, so will RFID become "chipless". It will take longer, because some of these tags need to be "read-write" at a distance and hold 126 or more bits of data and few chipless technologies can yet achieve this, nor do they often have enough range.

However, we feel that one cent or less must be the price of the tag if hundreds of billions or more are to be sold and, together with EPCglobal Japan, Unilever, Deloittes and others, we doubt if silicon chip technology can get there while generating a sustainable profit for all in the value chain. We therefore project chipless RFID technologies eventually taking over as shown in table 7. Alien Technology, putting in production capacity for tens of billions of chip labels yearly – well ahead of anyone else – disagrees.

Any move to chipless technology is not necessarily bad news for label makers as long as they make what is needed. The tag will still be in the form of a label, indeed chipless technologies often use conventional labeling and printing technology whereas chip constructions often do not.

Unfortunately, the lesson from barcodes is not such good news. Today, there are very few barcodes made as labels with nothing but the barcode on them. Nearly all barcodes are printed "free" on products or, more often, their packaging as the conventional graphics and alphanumerics are applied. That must be the end point for RFID as well. Indeed, one form of chipless RFID label currently in preproduction and laboratory development is the totally printed transistor circuit using organic semi-conducting inks. Currently the life and the performance of these is inadequate and cost advantages have yet to be demonstrated.

However, by this or another route, someone will surely end up bypassing the label with RFID as with barcodes. At IDTechEx we agree with one of these developers, Plastic Logic, that such technology will first appear on labels and then only in high volume after 2010 but who knows? OrganicID and PolyIC promise to commercialise such technology within two years. It promises to be a wild ride.

It is with the massive potential growth for RFID labels over the next ten years in mind that IDTechEx and Tarsus have joined together to organize Smart Labels 2005 to be held in Baltimore from the 27-30 June. This event will be very much focused on identifying why the label converter should be interested in the new item level RFID label markets, highlighting how they can go about getting involved in the RFID smart label manufacturing business, and what kind of technology and investment is required. There will also be a number of practical Masterclasses for converters wishing to set up manufacturing capabilities.

For more information also read "RFID Forecasts, Players, Opportunities 2005-2015" www.idtechex.com.

To register for Smart Labels 2005 contact Rochelle Yates ryates@tarsus.co.uk. ■

Table 7: Chipless percentage share of the overall RFID market by numbers of tags 2005 to 2015

No billion	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Chipless	5.5	5.5	5.6	6.0	10.0	15.0	20.0	25.0	55.0	79.0	99.0

Source IDTechEx

Extending the digital offering

Green Bay Packaging responded to a customer's request for a lighter HP Indigo backing liner, making way for a new range of digital top-coated substrates

Since the launch of the ws4000 two years ago, HP Indigo has sold over 110 label printing presses worldwide. As digital capabilities become more widespread, printers are increasingly looking at ways to differentiate themselves and increase their offering to customers. In times where market survival is linked to targeted messaging and product customization, what manufacturers and marketers need are further packaging options.

Prestige Label of Burgaw, NC, invested in its first ws4000 in 2001. It added customized finishing equipment and established a quality, agile process to print digital labels for businesses of all sizes. Over the next few years, the process has evolved, but its focus has never changed.

'The idea was to develop a process that gave companies cost-effective access to short- and mid-sized production runs of ultra-high quality labels,' says Elisha Tropper, president of Prestige Label. 'Like most of our services, we identified the need in our customer base. From new product development, to limited-edition or specialty products, our customers needed a mechanism by which they could get to market quickly, and in many cases, in a less costly manner than they could produce in-house.'

Fernanda Ferreira, marketing director for Marinize Products Inc., a manufacturer of household products, reinforces this sentiment: 'Prestige's short-run digital capabilities are extremely consistent with their high-definition flexo printing,

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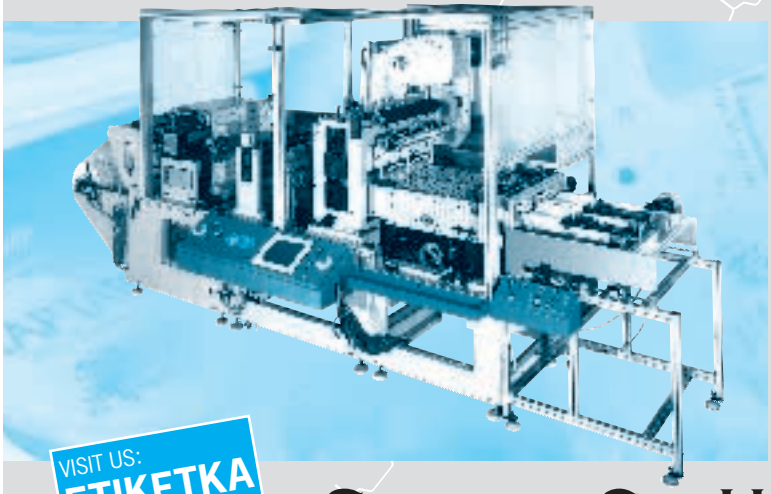

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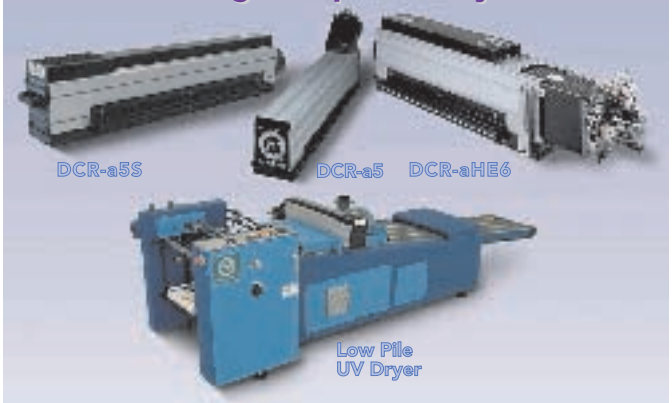

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enabling us to efficiently purchase labels for a diverse family of products, regardless of the varying quantities of the different SKUs.

'In addition, Prestige's digital label printing is a valuable resource for us in that it allows us to launch new products at dramatically lower costs.'

As demand for the digital business grew, the need for new and different substrates also increased. On the flexo and offset side of things, converters are spoiled with a vast range of qualified materials and suppliers with the knowledge of how to work with them. The HP Indigo press has been commercially available for two years and that resource is less mature.

'The interesting aspect with new product development is that there is no single recipe that can be used from one product to the next,' says Tropper. ' There are many variances with ink, adhesion and more, making it an extremely complex process.'

Prestige identified the need to have digital label products to run on a 40-pound liner. At that point, no one had developed a liner that thin for printing on an HP Indigo press. Prestige needed a partner with the experience and the in-house capabilities to develop new products for the digital process. Green Bay Packaging and Prestige joined forces and together they developed a number of solutions for topcoating and pressure-sensitive adhesives. An unexpected outcome of this process was the development and perfection of numerous digital products that opened the digital process to a completely different set of possibilities.

Some of those products include Green Bay Packaging's bright white semi-gloss, bright white gloss BOPP, rainbow hologram, silver metalized paper, wine label, and clear high gloss BOPP. Green Bay Packaging developed surface treatments called Digital Top Coatings for both paper and plastic film substrates.

'With conventional offset printing, different inks for papers and non-absorbing plastic films are required, the latter usually need UV polymerizable inks,' explains Chris Tanley, product development director, Green Bay Packaging. 'Particularly absorbent papers can also increase offset ink consumption by up to about 50 per cent, which contrasts with HP ElectroInk where consumption has almost no dependence on the substrate properties. Dry-powder xerography is heavily dependent upon the electrostatic properties of the paper substrate, and small changes in the environmental relative humidity may result in noticeable variations in print quality. The high fusing temperature needed for xerography also puts serious limitations on the choice of coated paper stock or plastic films that can be printed.'

'HP's range of Indigo digital printing presses, based on its digital offset color technology and process offers a unique combination of high-quality imaging, speed, a wide range of color options, substrate versatility and the ability to vary every printed copy,' adds Tanley. 'It's a great solution for businesses seeking quality and flexibility.'

The technology is a powerful, cost-effective alternative to traditional offset or high-definition flexographic printing. It also gives businesses the ability to test prototypes, deliver multiple versions (different languages, SKUs, etc.) and offer seasonal or promotional products.

In short, the digital printing process gives companies the ability to do more with less, which seems to be a business requirement that isn't going away.

According to Tropper: 'There are many uses for this process and the products Prestige Label and Green Bay Packaging have developed. The only limitations right now are those of creativity or imagination. As this process continues to evolve, I am confident the opportunities our customers have with the process will continue to expand as well.' ■

"The interesting aspect with new product development is that there is no single recipe that can be used from one product to the next"

Humidity and how it affects your profits

Pierre Husson, president of Husson Inc., Sturtevant, WI, outlines the problems converters face following a drop in relative humidity during the winter months

Label printers commonly face heating season problems caused by dry air. Problems like static electricity, warping and dimensional changes and ink coverage maladies, affect press performance, speeds and run time, die-cutting and finishing accuracy, quality and waste. Any of these problems can cut into profits – sometimes severely.

Bruce Warkentien, print cell manager at Smyth Companies, Minneapolis, one of North America's largest sheetfed label printers says 'Label printers have always had more waste and rejects in winter, when the bottom fell out of our humidity levels.' Ed Allie, director of engineering & maintenance at Massachusetts-based FLEXcon, Inc., a supplier of pressure-sensitive films and labeling substrates to printers and converters adds: 'In our plants, dry air caused static electricity, which became a significant manufacturing and safety issue.'

If you investigate printing and finishing problems from winters past carefully, you'll find most are related to dry air, and a lack of humidity in the plant. In most cases fixing the problem could be faster and easier than you thought. It doesn't have to be expensive, return on investment (ROI) is fast, and the fix is usually permanent.

Humidity problems often misdiagnosed

Since many dry air problems are seasonal, managers often misdiagnose them, blaming bad stock, machinery problems or other year-round problems for problems actually caused by a seasonal loss of humidity.

If you maintain proper relative humidity (RH) throughout the cycle of transportation, storage, sheeting, printing, die cutting and finishing, it will have a substantial impact on the moisture content of the materials you print and finish. That will lead to fewer manufacturing and safety problems and to a better working environment.

Heating winter air to normal indoor temperatures pulls the humidity out of air, so air in plants is often desert dry, with RH dropping to less than 10 per cent. For instance, outside air with 50 per/eight cent RH at 10°F drops to 8 per/eight cent RH when air is heated to 70°F. Production problems are common and often serious at this level of humidity.

Ideal RH for printing and finishing is 45-55 per cent, at 68°F-72°F. It is hard to maintain this level in heated air, and in most plants, adding moisture to the air is necessary.

Static electricity problems

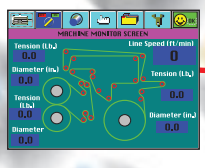
Static electricity is usually the most obvious sign of dry air problems. Sparks and shocks are obvious signs, but static electricity levels you probably wouldn't notice can adversely affect equipment and processes.

Static electricity is the culprit behind lots of production and safety problems. For instance, says FLEXcon's Allie, 'in slitting and sheeting plastics, static electricity affects the efficiency of our machinery and can even damage it.'

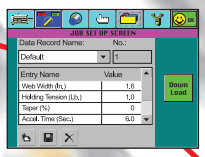
Both sheets and rolls of plastic label substrates can cause problems to printers if static is not eliminated at the supplier. Alli adds 'We produce both rolls and sheets. If we don't eliminate it here, static discharges can become magnified when our customers screen print and die-cut, resulting in big-time ink adherence and sheet separation problems.'

Static can cause problems with inconsistent ink adherence on polyester, polypropylene and other substrates, Allie says. Print quality drops and waste soars. Sheet separation and misfeeds are also common when static causes rolls or sheets to stick together. Press jams and stops cause waste and

Machine Monitor Screen

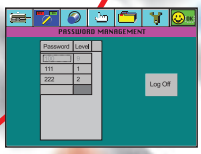


Job Screen

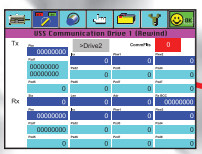


Alarm Display Screen

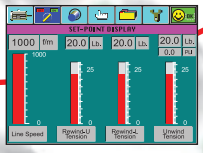
Limits Screen



Password Mgmnt Screen



USS Communication Screen



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Overview

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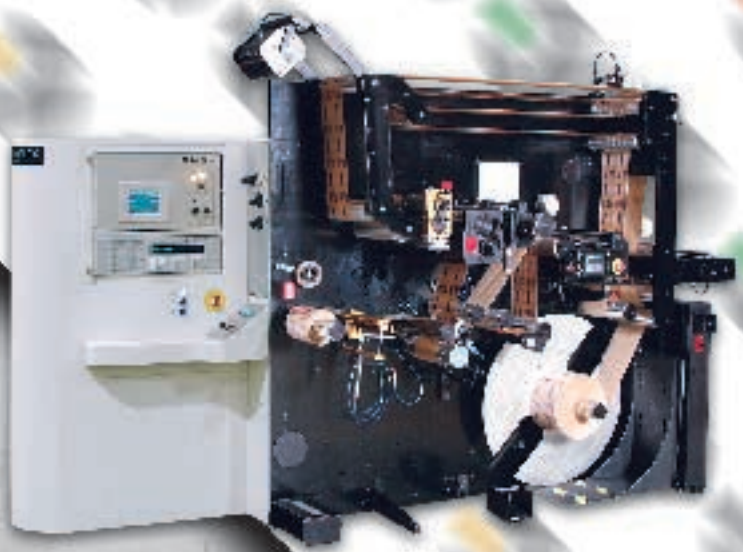

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Smyth Companies, Minneapolis, has reduced maintenance and energy costs with a high pressure humidifier

downtime, and often machine speeds must be sharply reduced.

Allie adds: 'Ensuring the safety and comfort of operators is important too. Static shocks can cause people to flinch or jerk into machinery or even to stumble and fall.'

Other dry air problems

Most other problems occur when paper or other substrates are exposed to dry air in the plant. For instance, paper normally contains 5-10 per cent moisture as it comes from the mill, but paper's moisture content can change rapidly as it comes into equilibrium with its surroundings.

The performance of virtually all types of substrates can be negatively impacted by exposure to air that is too dry; especially the size and condition of materials to be printed, die-cut or otherwise finished. Shrinking, warping, wrinkling and curling of paper and substrates can cause a variety of problems.

Make sure stock doesn't lose water and begin changing dimensions in transit or in storage. Once damage is done, it is usually impossible to correct. Keep wrapped stock wrapped. Use stock as quickly as possible after it is opened. Loss of humidity on uncovered edges of stored paper and stock causes warping, bowing or curling. Materials fold and jam, slowing press speeds and causing work stoppages, extra clean up and waste. Once edge tightening has occurred, it is virtually impossible to correct.

Dimensional instability affects both length and width of materials, but is usually more severe in the width, leading to registration and die-cutting problems. A change of just 0.04 inches one foot can lead to misregistration of almost five halftone dots. Dimensional changes also cause sheets to become too small for dies, requiring re-working or replacing dies, and excessive waste. Sometimes unsightly wrinkles make stock unprintable, resulting in more waste.

Dried-out stocks suck up ink; uniformity is lost, quality suffers and ink costs go sky high. This results in more stops, more tweaking and adjusting, plus problems with waste, on-time delivery, overtime and cost control.

Your people

Correct humidity benefits more than just production processes. It provides better indoor air quality and a healthier climate for everyone. Maintaining proper humidity levels minimizes problems with fumes, dust, allergies, colds and flu. Sick days will be reduced and productivity increased.

A simple solution

These problems can be avoided by maintaining proper RH and temperature levels in storage, prepress, pressroom, die-cutting and finishing areas.

There is a wide array of technologies and products aimed at

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In February 2005 INTERCOAT will be going **live** with its all new Internet presence, including a complete product guide of its range, contact details with Photograph for the Customer Service and Technical service departments, also all Product information available as Download, along with the favourites such as Express service, Net width programme, Call off order process etc. etc.

Sales and Marketing Director Tony Harman "Since joining INTERCOAT last year, our Internet presentation was a major issue which drastically required updating. Our new WWW site is a joint collaboration from the whole Intercoat team, I am very proud of the final result – a comprehensive tool for all our Partners situated in over 42 Countries around the globe, additionally an informative platform for all potential customers to receive up to the minute information to assist them in sourcing their exact requirements.
Together with our monthly News-ticker and Newsletters, Intercoat is now much closer to our Customers than previously was the case.
Initially available in German and English language, we will be rolling out in French and Spanish during the year, culminating toward the end of 2005 with an Online shop including Product availability, individual pricing and order tracking, naturally all Password protected.

After a truly eventful 2004 Intercoat`s concept is now based on stability and continuity concerning all aspects of our International and national Business."

Intercoat is also attending various exhibitions including FESPA, this year being held in Munich, Germany. Presenting a clear focus on the Digital Printing industry, with many new products complementing and extending its existing offering to this growth segment of the market. Without a doubt the highlight for 2005 will be the Labelexpo in Brussels, here Intercoat have a new Stand and look forward to exhibiting together with its exclusive partners several new developments for the Label industry.

21 - 24 September, Brussels
LABELEXPO Europe 2005
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The Husson ML Princess unit (right) makes sure that stock doesn't lose water and begin changing dimensions

solving humidity problems. Each converts water into fine droplets that are evaporated into your plant's air. The smaller the particles, the faster and more efficiently they increase RH.

Any of the leading technologies can provide adequate humidification, but the methods are not created equal in every situation. Each method has strengths and weaknesses in cost, efficiency and effectiveness, depending on your specific circumstances.

It is important to use clean, soft water in your system. Depending on the water quality in your area, it may be necessary to use conditioned or reverse osmosis (RO) water. Steam systems produce very fine droplets which evaporate quickly and efficiently. But steam systems also produce heat and most plants don't need added heat.

Today most steam systems are 'electric steam', using electricity to heat water. Since electricity is a high-cost source of heat, electric steam usually has the most expensive energy costs. Maintenance costs to prevent build-up of corrosive residues on heating elements are also high.

Centrifugal systems atomize water using centrifugal force. Units have low installed and operating costs. They create larger droplets, causing slower absorption of water into the air, and sometimes leading to excess condensation problems and wetness. Air quality and health concerns also have been raised over open water baths, which may promote bacteria growth.

Ultrasonic humidifiers use high-frequency electricity to break droplets from a water bath. Ultrasonic systems are more energy-efficient than steam or centrifugal humidifiers. The same air quality and health concerns have been raised over water baths.

Compressed air systems use high velocity air to blow water through a nozzle into fine droplets. Since no heat is involved, energy and maintenance costs are low. The high-pitched sound from nozzles can be annoying to employees, so they are best used where they are not close to work stations.

High-pressure humidifiers use a high-pressure electric pump to drive RO water through a fine nozzle at pressures of 900-2,000 psi, creating a fine mist or "fog" of droplets. Since no heat is required, it is an inherently energy-efficient method. Installed cost is much lower than steam or compressed air systems and noise is not usually a problem.

For most users, the biggest selling points for high-pressure humidification are low maintenance costs and very low energy costs. Energy costs for high-pressure systems are 15-20 per cent those of compressed air systems, and less than one per cent those of electric steam.

High-pressure systems' fog requires a longer distance to evaporate than some methods. This can be overcome by a system with a built-in fan. Units with fans distribute moisture with greater uniformity and allow humidifiers to work in areas with ceiling heights as low as 8 feet.

If you take a hard look at last winter's production problems, you'll find that with the methods of humidity control available to you, solutions can be simple, fast, easy and inexpensive.

Says Ed Allie of FLEXcon: 'We've had no problems with static electricity; and no major reruns or customer complaints. And not a safety incident, either.'

Smyth Companies' Warkentien puts it this way: 'We've consistently met or exceeded our goals for quality improvement, reduced maintenance and reduced energy costs. And in every plant we've achieved investment payback in two years or less.' ■

Selling security to brand owners

With the approach of Pisec 2005 in Vienna, Austria, 18-20 April, **R.Craig Curran**, of Trustcopy USA, looks at how security label solutions can be used to grow your business

Security is a hot topic with major brand owners around the world. The issue of brand protection is fast developing into an area that demands attention and brand owners are designating security directors, security teams and committees, and embarking on the implementation of security measures for their products.

What has caused security to become such a growing concern? We now have a growing number of instances of counterfeiting. Let's just look at just a few in the recent past. First, Lipitor and Viagra experienced counterfeiting problems and now baby formula has even become a popular item. There have also been numerous instances of natural vitamins like St Johns Wort being counterfeited. All of this causes the FDA to take a more active role, especially when you consider that the number of pharmaceutical-related counterfeits rose by over 400 per cent in the last few years. The FDA wants the US pharmaceutical manufacturers to implement mass serialization, either through RFID or some other security related initiative.

However, it's not just a pharmaceutical problem. There is a growing counterfeiting problem in consumer goods such as DVD's, CD's and software. The Last Samurai DVD was counterfeited before it ever hit the big screen. Companies like Microsoft, Adobe, and Intuit are constantly dealing with counterfeit products. As sports apparel has grown in popularity, so has the number of problems with counterfeit jerseys and hats. No market is safe. Almost everything is counterfeited these days, including cigarettes, cosmetics, food and stamps.

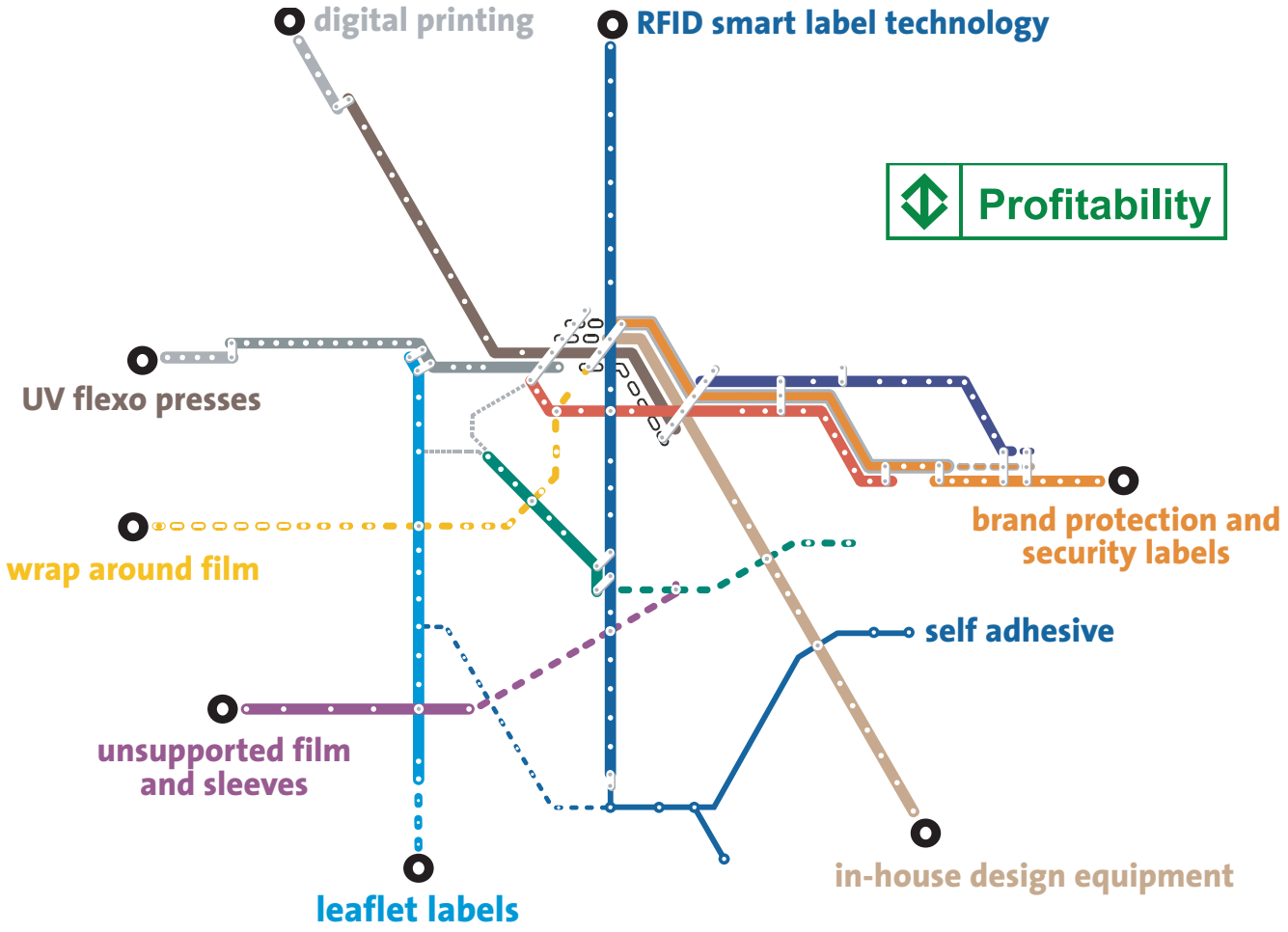
As the brand owners are faced with an increasing number of counterfeits they are driven to implement security into their packaging. The brand owners must do this for various reasons. First, the brand owners need to mitigate the losses and protect the revenue stream for their company. Second, the brand owners are concerned about their reputation and the erosion of brand equity if counterfeiting is associated with their product. Next, the brand owner is driven to implement security in an effort to minimize liability from lawsuits or regulatory penalties. A growing concern is the link between terrorist organizations and counterfeit goods.

> "The FDA wants US pharmaceutical manufacturers to implement mass serialization through RFID or other security initiatives"

As label or packaging printers we need to develop a security portfolio of products to meet the needs of brand owners. Just consider that security labels are currently growing at a rate of 14 per cent per annum through 2007 and will then triple between 2007 and 2012, growing to a $1.2 billion industry. We will see the same type of growth we saw when, for instance, supermarket scale and bar code Labels first entered the market. Those printers who develop the right marketing and manufacturing techniques in those respective areas were able to build a sizable business. No doubt exists that the largest growth area for labels

R. Craig Curran is managing director of Trustcopy USA, Inc., Winter Springs, Florida.

Where is your label business heading?



Latin America is a region of growth and opportunity for the label industry

You're already in the right place, now is the time to take advantage – at Label Summit Latin America! A two-day conference and tabletop exhibition highlighting the latest label industry developments, new solutions and investment opportunities.

Choose from over 20 sessions on new technology solutions; from in-house design equipment and UV flexo presses to computerised plate-making and digital printing. Plus new labeling solutions, including wrap around film, unsupported film and sleeves; together with brand protection, security labels and RFID smart label technology.

Network with over 50 of the industry's leading suppliers at the tabletop exhibition (free entry for conference delegates), big names include: Avery, Mark Andy and HP Indigo.

Whether you're a large or small converter, Label Summit Latin America will provide you with the information and contacts you need to rationalize investment decisions and grow faster in the years ahead.

If you're part of the label industry in Latin America, you need to be here!

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and packaging over the next three to eight years is security. brand owners will be looking to printers who have a solid portfolio of security options to place sizable business during this period including overt, covert and forensic options.

Let's look at an example of a layered Security solution with rotation in order to see how a printer might serve a brand owner. A good idea is to start with an overt security solution. For instance, a printer might provide a hologram, a special material with an embedded thread, or even a color shifting ink like we see on the recently revised US currency. All of this might give a degree of confidence to the consumer, but it won't stop the counterfeiter. Therefore, the printer will want to offer the brand owner a covert device. The printer might embed an invisible optical watermark in the graphics of the package. These optical watermarks are available from Trustcopy.

Trustcopy provides optical watermarks as a complimentary and added protection layer to the overt security device. The watermarks are invisible to the human eye, except when viewed with a unique lense key. These lense keys are actually supplied to members of the supply chain (manufacturer, wholesaler, distributor, and retailer) in order for the product to be checked along the distribution channel on its way to the consumer. The counterfeiter does not know they are there, and even if he does he can't copy or duplicate them.

These optical watermarks can be run by almost any print process – offset, gravure, flexo, letterpress, ink jet, laser, etc. They are also flexible by allowing the printer to use most any type of substrate. The watermarks can be placed in screens, process work, bar codes, or even printed with a UV invisible ink. The watermarks can be as sophisticated as a human face or as simple as a series of numbers. Watermarks can all be put in the same place in the label, up to 20 different images deep. The watermarks can be static from one product to the next as well as dynamic, changing as often as the brand owner likes and can even match a variable serial number, lot number or bar code.

For instance, if a brand owner of a spirits product like a Vodka wants to implement Security the printer can provide a hologram. The printer might also implement a watermark for the brand owner with four different images deep, one for each member of the supply chain. One watermark might be a company logo, the other a lot number, the other a country of origin and the final watermark might be UV invisible, which can only be seen under a black light.

As three, six, or even 12 months go by, the security devices can be rotated. For instance, the overt hologram could change. The printer can also assist the brand owner by changing the watermarks. This rotation is made in order to stay ahead of the counterfeiter, maximizing the brand protection for the owner.

So how does the packaging or label printer sell security to the brand owner? There are some keys to successful selling. You must determine who in the brand owners organizational structure is in charge of security. Unfortunately, security and brand protection is still evolving, so many organizations are handling this in a different manner. There is no one set person and you will have to do some research.

- Find out what issues the brand owner is currently having regarding security and what their objectives are. This will allow you to structure some very clear ideas for them on how they can meet their objectives.
- Offer the brand owner an array or portfolio of products by educating them on your recommended options.
- Provide them samples of their labels with whatever security devices deployed that they requested. Nothing sells better than actual samples of the brand owner's product with security features buried therein.
- In cooperation, with the brand owner develop a long term plan on how the devices can be rotated and changed in order to provide for ongoing protection.

By doing all of this what will you the printer gain? You will certainly increase your ability to retain business with your present brand owner as they implement Security into labels you are presently printing. More importantly, if you are a progressive printer, developing security capabilities, the chances are high you can increase your sales with the brand owner you serve. This is also a very good opportunity to increase your margin and profit by offering value added services to the label, not previously utilized.

One of the largest advantages is the opportunity to get an audience with new brand owners you do not currently service by offering security solutions that other printers do not provide.

> "With the brand owner, develop a long term plan on how devices can be rotated and changed to provide for ongoing protection"

Counterfeiting for brand owners is a growing problem. Brand owners will be addressing this problem in high numbers and with great determination in the years to come. As a result, the growth in security labels will create a whole new opportunity for the printer. With this in mind, the progressive printer will want to create the capability for providing security related products. The security related products will need to be layered and rotated for the ultimate success. A good example of this is the use of an overt RFID and a covert optical watermark. When these are coupled together the printer can then effectively use various key selling techniques with the Brand Owner. By selling security to brand owners the printer can keep and gain business, while also improving profitability.

It's time to get in the game! ■


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The changing world of Labelexpo

As Labelexpo enters its 25th year, it is perhaps an appropriate time to ask: 'What is Labelexpo' and how has it changed over the years. **Mike Fairly** reports

It is now 25 years since the first dedicated label exhibition took place. Held in London, Labelex was a small niche national exhibition for the labeling, coding and marking sector. Sponsored by Labels & Labeling, and with an associated conference, the show was the forerunner of today's global Labelexpo shows.

By the mid 1980s this unique label exhibition had moved to Brussels. Now adopted by the major narrow-web press manufacturers and labelstock suppliers, Labelexpo soon became a pan-European event to showcase the best in, largely, the fast evolving pressure-sensitive label market.

At this time pressure-sensitive labeling was beginning to go through something of a technology revolution. The growth of rotary letterpress and the development of rotary dies, the birth of digital artwork and repro, the concept of rotary screen and combination process presses, fast-evolving UV-curing inks, the early introduction of direct thermal materials and price-weight labeling – this was the pressure-sensitive industry moving from a craft-based industry to a technology lead sector.

Over the next ten years the Labelexpo shows, which by now had also been established in Chicago and Singapore, were to be at the forefront of changes in the way that pressure-sensitive labels were produced, and also helping to bring more of a global standardization in label materials, technology and applications.

During this period, the industry was faced with environmental pressures on PVC films – at that time largely used for point-of-sale and display stickers. This led to the introduction of new filmic labelstocks such as OPP, polyethylene and polyester which, in turn, helped to create whole new markets for product labeling using clear and specialist plastic films.

The industry was also to see the move from digital black-and-white printing technology to new generations of digital color presses, the continued evolution of digital pre-press and digital-to-plate solutions, as well as the launch of digital die-cutting equipment.

> "Today, flexo and UV-flexo technology dominate the world of pressure-sensitive labels, with presses becoming wider and faster, and more sophisticated"

In addition, the period from the late 1980s to the late 1990s saw the rapid evolution of quality flexo printing and, most recently, the dramatic growth of UV-flexo. Today, flexo and UV-flexo technology dominate the world of pressure-sensitive labels, with presses becoming wider and faster, more sophisticated, incorporating new generations of anilox rollers and inks – and moving into markets beyond self-adhesives.

During this first fifteen years or so of Labelexpo shows the pressure-sensitive label industry moved from a niche, largely craft-based, industry with little more than a fifteen percent share of the developed label markets, to one in which it became a technology based industry with mass applications in food and retail, cosmetics and toiletries, pharmaceutical and healthcare, and industrial labeling solutions. Pressure-sensitive labels had now become the dominant label solution in the developed markets with more than a 50 per cent market share

Few would doubt that Labelexpo shows, supported by industry

Fig 1. Reasons for visiting Labelexpo

- Keep in touch with industry 24%
- Source new products 17%
- Meet specific suppliers 17%
- Source new suppliers 13%
- Compare products 12%
- Find specific product/service 11%
- Obtain quote 4%
- Make purchase/place order 3%

conferences and seminars and a dedicated label industry magazine, were largely instrumental in steering the pressure-sensitive industry to what it had become by the end of the 1990s. But where is the label industry today, and what is the role of Labelexpo in the new world of labeling?

Well, the label industry is certainly undergoing another period of substantial change, albeit one that is now undoubtedly moving from a technology-based industry to one that is totally service orientated and, perhaps even more importantly, moving to an industry where a fast-emerging global label market is having a major impact on industry suppliers and label converters, on label end-users, on the label supply chain, and on the industry's cost structure.

In addition, the rise and rise of film labeling and no-label look solutions, combined with the quite dramatic growth in the use of plastic – particularly PET – bottles, has contributed to a major explosion in new methods of product decoration and labeling such as sleeving, wrap-around film, in-mold and cut-and-stack film labels. Likewise, digital color label printing is now an accepted production technology and has one of the fastest-growing installed bases of all label presses.

And what most excites the label producer and user today? RFID and smart label solutions that are already beginning to revolutionize the tracking and tracing of goods, shipping and handling, and supply chain management, as well as the introduction an exciting new potential for labels that are time or temperature dependent, can help to preserve food, aid processing operations, absorb moisture or are gas sensitive.

Like the rest of the label industry, Labelexpo has had to adapt to this changing world of labels. No longer only based on pressure-sensitive technology, the show presents materials, technology and products for almost all kinds of product decoration and labeling, while associated events are aiding the development of smart packaging and smart labeling.

Based on visitor surveys now undertaken at Labelexpo shows, most recently at Labelexpo Americas in Chicago, Labelexpo shows are becoming a global series of events – in Europe, in the Americas and in Asia – which meet visitor expectations and requirements in keeping them in-touch with the industry, bring them up-to-date, meet new and existing suppliers, compare products, and invest in the latest label and product decoration solutions.

> "37% of visitors surveyed at Labelexpo Americas already indicate that they are planning to move beyond traditional pressure- sensitive label solutions into RFID"

Interestingly, almost 37 per cent of visitors surveyed at Labelexpo Americas already indicate that they are planning to move beyond traditional pressure-sensitive label solutions into RFID, while 16 per cent are planning to move into shrink and wrap-around label technologies. Almost as many are looking to move into flexible packaging – largely using narrow- to mid-web

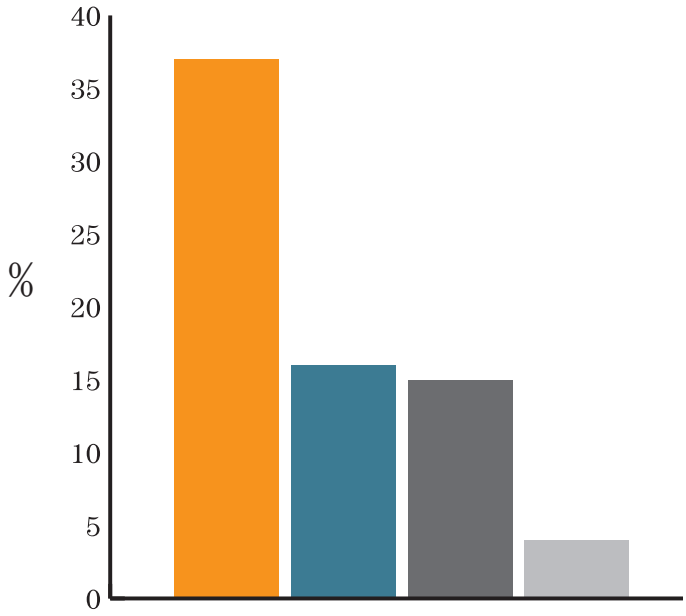

Fig 2. Areas that visitors are looking to move into

- RFID labels 37%
- Shrink/wrap around labels 16%
- Flexible packaging 15%
- Folding cartons 4%

presses.

In terms of trends developing within the label industry over 27 per cent see flexible production requirements as being a key area of development within the label industry, while some 30 per cent of visitors see the continuing evolution of digital workflow as being of major importance. Declining print runs are seen as important by around 17 per cent of show visitors.

Not un-naturally, the global Labelexpo shows are now rapidly evolving into shows that are no longer predominately covering the ongoing evolution of the pressure-sensitive label sector. Exhibitors at the most recent shows in Brussels and Chicago were showing a variety of presses running unsupported film for sleeving, wrap-around and cut-and-stack film, pouches, and a variety of flexible packaging applications – even for folding

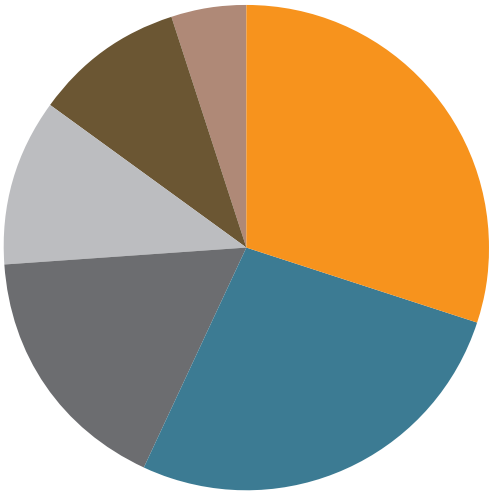

Fig 3. Key trends that visitors see for the future

- Digital workflow
- Flexible production requirments
- Declining print runs
- Production of non-label products
- Production of non self-adhesive products
- None of the above

"RFID, smart, smart active and intelligent label solutions or technology, brand protection/security labels, now make up around 10 per cent of exhibiting companies"

carton production.

RFID, smart, smart active and intelligent label solutions or technology, brand protection/security labels, and other clever label solutions now make up around 10 per cent of exhibiting companies, and will become ever more important in the future – both in terms of exhibitors and conference/seminar sessions.

Interestingly, traditional sheet-fed offset wet-glue label printers are also visiting Labelexpo in increasing numbers. With their key bottle decoration markets in soft drinks and carbonated beverages moving from paper labels to web-fed filmic solutions, and even some wines and beers turning to filmic labels, the sheet-fed printer is now looking to invest in other label production technology and applications.

Fed by Label Summit-type conferences and table-top exhibitions in the emerging markets of Latin America, Eastern Europe, South-East Asia and India – and a specialist summit covering the Japanese market – the global Labelexpo shows are once again at the forefront of the fast changing world of labels. No longer just shows for the pressure-sensitive sector, they are now world-leading networking and sourcing events that combine a show, seminars, workshops, industry awards and supplier receptions that cover virtually every type of product decoration and labeling solution – from bar code and product labels to RFID and smart technology – as well as overlapping into flexible packaging and folding cartons.

Virtually any material used as a label or tag, every printing process, the whole gamut of digital workflow, repro and printing, all labeling solutions and the latest advances in management and production information systems, are all now on display at the global Labelexpo shows – which was the original idea behind the launch of the Labelex show in London some 25 years ago. It's just that it has taken a quarter of a century to achieve it. ■




Emballage 2004

Europe's second largest packaging show included much of interest on the labelling front, including RFID-enabled labeling equipment and a strong showing from the French converters' association UNFEA

The Paris Exhibition Centre, for those who do not know it, is close to the terminal buildings of Charles de Gaulle airport, one of which fell down a few months ago. The exhibition halls, happily, do not seem to be prone to collapse. This was no doubt a great comfort to exhibitors and visitors to Emballage, held in November 2004, which brought together all the Great and Good of the French packaging world. This latest show had 2300 exhibitors (slightly down on 2002) but visitors at 109 000 were slightly up. What's more, according to the organisers of the show, over 30 per cent of the visitors were from outside France, confirming the show's status as a pan-European event second only to Interpack (Düsseldorf).

Liquid assets

There were two "special interest" halls. One of these, almost a mini-exhibition in itself, was reserved for the filling, packing and labeling of liquids (both food and non-food). A prominent exhibitor in this section of the show was Krones, a world leader in manufacture of complete filling, packing and labeling lines for bottles and cans. Area marketing manager Olivier Genin told Labels & Labeling, Emballage 2004 has so far been a worthwhile show for us. It's not so international as Interpack but definitely the right place to meet customers from France and also from the French-speaking parts of North and West Africa, which are up-and-coming markets for us especially in the brewery and soft drinks sectors.' There was however no labeling machinery on display on the Krones stand. 'Our labeling equipment is by now so well known in France,' explained Genin, 'that we preferred to show our blow moulding machinery which is a radically new development.'

Labels Galore!

The 'Label Village' experiment at the 2002 show was not repeated, nor was the 'printed packaging' zone, but instead there was a 'special interest' area launched by the show's organisers for the first time, and devoted to package design, converting and decoration. Many of the 20 or so label converters among the exhibitors were nonetheless grouped in one hall, as were the makers of coding, marking and labeling equipment.

Etiquetage Rationnel (ER), which makes labeling systems and also imports and distributes for Sato, Label-Aire and Altech, were showing a new entry-level compact barcode printer available in both TT and TD variants, and an RFID-enabled printer specially designed for the textile and clothing industries. Visitors from the food packaging sector were showing particular interest in the Sato CL 408 RFID label printer which uses UHF 648 MHz frequency and which, Sato claims, 'can reliably read all individual units within a pallet'. On the same stand was the latest blow-on high-speed labeller from Denmark's Label-Aire,

> "Visitors from the food packaging sector were showing particular interest in the Sato CL 408 RFID label printer which uses UHF 648 MHz frequency"

with a top speed of 1,000 labels/minute. Interviewed at the close of the event, ER's marketing manager Cécile Desprez told Labels & Labeling, 'Visitors to our stand are 45 per cent up on 2002, and it's interesting to note that these visitors mainly came to see our traceability and RFID technology. By the way, we are the only exhibitor at the 2004 show to offer a full range of RFID applications, for food, logistics, textile and medical fields.'

On the stand of Omme France, the Italian manufacturer PEE

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"This POS device means customers can write individual messages, choose a design, and in 20 seconds out comes a customised sleeve-labelled bottle"

was staging the world premier of its "Modulo" industrial labeling unit, comprising three trolley-mounted labeling heads built around a central column. Servo drives enable each label head to be driven independently. The unit was demonstrated applying several labels in one pass.

Sleeves and more sleeves

Sleeve labels for bottles are now an established decorative option and market leader Sleever International, with its headquarters near Paris, was on home ground at the Emballage show. Its stand was large and colourful and obviously popular. On show was the new "Powersleeve" which can apply sleeve labels with in-line micro-perforations at speeds up to 36,000 bottles per hour. Another crowd-puller on the Sleever stand was "Mysleeve". This point-of-sale sleeving device means that customers can write their individual message, choose a design from a collection, and in 20 seconds out comes a customised sleeve-labelled bottle of champagne (or Pepsi, or whatever, but Sleever wisely chose the local product for their demo). A gimmick? Maybe, but it shows what sleeves and digital technology can get up to when they come together.

Another company with a similar eye-catching product at the show was Digital Packaging. This French company was displaying (and even, occasionally, offering) bottles of champagne (again) with colourful sleeve labels individually printed with the recipient's name. The company's General Manager Gilles Pingeot explained, 'We have a very visual product, so exhibitions like Emballage are important to us. With three roll-to-roll and two sheet-fed digital label presses we are at the cutting edge of digital technology for this kind of label. In partnership with Artwork Systems, we have developed software which will automatically process and design any kind of label artwork so as to adapt it for one of the bottle shapes on our data base. And since sleeve labels are often used for high-value branded goods, we can also incorporate into the label sophisticated security features to deter product piracy and parallel trading.'

It was noticeable that many exhibitors were surreptitiously moving downmarket, to capture market share at a time when many of their customers are holding back on major investments. Avery Dennison Labeling Systems, for example, was launching its PLX pallet labeller, a simplified version of its existing equipment, but still with many of the same features.

Melissa Plénier, marketing manager for Avery Dennison Labeling Systems, said 'Visitor attendance on our stand so far has been only slightly up on 2002, but with the new legislation on traceability just about to come into force, this has to be the right show at the right time for us.'

A similar strategy could be seen on the Pago stand. This Swiss manufacturer presented its new labeling unit Pagomat 3/150, a simplified version of older models. 'Pago is a major operator in France with 70 employees and sales of over ¤ 10 million,' said Pago's marketing manager Mr Court. 'With this new model we aim to win new business particularly with smaller customers.'

Label converters

Toronto-based CCL Label, with ten plants spread across Europe – of which three in France – showed its "Two-Faced" self-adhesive label developed as a half-way house between the simple label and the booklet label. With two or even three printable surfaces it is used for multi-language labels, or to combine two labels into one.

Smaller than CCL but with big ambitions was first-time exhibitor Reynders, a Belgian label printer now with plants in both France and Poland.

Other label-related exhibitors at the show included: CVP (France, tamper-proof labels), Etipack (Italy, labels), Delna (France, labeling systems), Domino (UK, marking and coding systems), Eticoncept (France, label printer-applicators), Finpac (Italy, stretch sleeves), Sitetic (France, double-side label printers), Alesta (Turkey, labels), Harland Machine Systems (UK, labeling machinery), and French label converters JPL, APE, Ruel, SEEC and Etinord, not forgetting the French label association UNFEA.

Prepress and materials

Artwork Systems is a company too well known in the packaging and labeling worlds to need introduction. At Emballage, Artwork demonstrated a PDF file which "memorises" all intermediate versions of a given file, so as to offer complete traceability through the whole design and pre-press stages.

There was little to excite the label converter on the substrates side. One exception was Breger Emballage which used the show to launch a new anti-counterfeit packaging film called "Secur &

Ident" which, Breger says, has already been successfully exported to Ukraine (for use on ballot boxes, maybe?).

Narrow web presses

Visitors to the previous Emballage show who were disappointed not to see HP's about-to-be-launched digital press, could catch up with the latest in HP's digital technology in 2004. The HP ws4050, a variant of the ws4000, is mainly designed for printing unsupported film and flexible sleeve packaging, using a digital offset process.

On the stand of its French agent TMT, Gallus staged the European premiere of its new, modified Gallus EM 280 press, which was first launched at Labelexpo Americas last year. The press ran full colour flexo wine labels then changed to unsupported film in a completely different motif. The changeover took under 8 minutes.

TMT also showed pre-press consumables from Toyobo, whom the company also represents in France, and a wide-web digital sheet press made by the Swiss manufacturer Luescher, which was one of the sensations of the show, printing sheets up to 300 x 350 cm.

Patrick Salhofer, president of TMT, reckons the French market for label presses in 2005 will show modest growth, much the same as in 2004. The free-falling US dollar has not hurt Gallus' sales, he reckons, either in France or elsewhere in the Euro zone. 'Our competitors in lower-cost regions like the Far East and North America are not really in quite the same market sector as Gallus. Of course we keep an eye on the competition – who doesn't? – but our direct competitors are mostly within the European Union rather than in other continents. And just for the record, I can tell you that the Gallus Group will almost certainly have a record year for sales when the 2004 results are finalised.'

Several machines at the show were specifically designed for processing RFID labels. France's MGM, representing labeling system manufacturer Schober GmbH, presented its brand new reel-to-reel machine for positioning antenna onto pre-printed RFID labels.

Also on the machinery front, Mecamarc presented, for the first time in France, a letterpress overprinter for adding text or sequential numbering to a pressure-sensitive label. The company, one of the very few remaining French narrow web machinery makers, has sailed through some troubled waters since the tragic death of its founder and president Jean-Claude Marcucci just over a year ago, but now appears to be back on an even keel.

Rotatek from Spain demonstrated a combination press (flexo-offset); the manufacturers insist that despite its maximum web width of 420 mm, the press is essentially designed for converting labels rather than packaging. ■

NIBS

Labels West
Domino VIP system

Seattle-based label converter, Labels West, Inc has installed a Domino ON Demand Variable Data Printing Solution.

Domino ON Demand is a complete variable data printing solution, comprising estimating, prepress, proofing and printing modules. The print system allows the end user to add variable data capability to a job and, at the same time, save time and set up costs by allowing prepress operators to design, layout and proof the job long before it reaches final print production.

Explains John Shanley, owner and managing director, 'Our VDP work would have previously been managed off-line. While this is OK for certain types of work, it limits the scale of applications and types of customer that we can serve. Via in-line printing on the Domino ON Demand, we can expand more into higher-end personalization print for applications like direct mail and promotional giveaways.'

The UV curing system means Labels West can turn jobs on any substrate around more quickly.

'We can actually laminate in-line and in the press, so if necessary, we are able to bury printed text or numbers underneath layers', he says. 'From a flexibility point of view, I expect the Domino ON Demand to open up new business opportunities, that we aren't even aware of yet.'

RFID smart label
DHL Fashion

ASK UHF C.label, a smart paper label, has been selected by the System Integrator NBG ID and DHL Fashion to track garments at its 18000 m² Paris distribution center. DHL fashion is in charge of forwarding 70 million clothes a year on 15 platforms of fashion clothing suppliers and boutique operators. RFID is implemented in the whole supply chain down to the retail shop. It involves garments reception, inventory, orders picking and delivery.

In the fashion industry, collections change four times a year which means that logistics is a fast moving and essential element in the supply chain. UHF based management solution prevents mistakes in the number of pieces ordered for a reference, in the choice of right sizes and increases speed of information storing and reading. It also optimizes invoicing for end of seasons returns from retailers to manufacturers. The first trial was launched this summer with a label of the Jacadi group.

30 years of Heidelberg UK

Heidelberg has been supplying offset presses to wet glue label converters in the UK for 30 years and now also supplies Gallus narrow web machines. **Barry Hunt** reports

In January Heidelberg UK celebrated its 30th anniversary as a wholly-owned subsidiary of Heidelberger Druckmaschinen AG. Bernhard Schreier, CEO of Heidelberg worldwide, hosted an event at Stationers' Hall in the City of London, accompanied by Wolfgang Gorth and George Clarke, the former and current managing director of the UK operation.

At the UK headquarters in Brentford, West London, Bernhard Schreier also made presentations to ten staff. They had been with the company since its formation as Heidelberg Graphic Equipment Ltd on 7 January 1975 as the group's first wholly-owned subsidiary. Since then the distribution network has grown to 250 offices in 170 countries, with 5,400 sales and service employees. Heidelberg UK is the fourth in the group's global league table. A staff of 427 people operate out of Brentford, Tamworth and Leeds to cover all the UK and Northern Ireland.

In his speech, Bernhard Schreier said the patterns of change in the industry worked against small independent dealerships. 'We have found that only wholly-owned subsidiaries can provide a full sales and service network, especially when complex ranges of pre-press and finishing equipment are included. Therefore, sales channels with 100 per cent ownership introduce many benefits for all concerned, not least in supplying spare parts. In addition, this arrangement gives us a better feel for the market and we have direct contacts with our customers.'

As for present trading conditions, he said that 2004 had been one of the most difficult in the company's history. The UK company had bucked trends by achieving 'decent results' to become the group's most successful subsidiary. He put a positive spin on Heidelberg's decision to divest of its interests in manufacturing newspaper presses. The sale of group interests in the NEXPress digital colour press was also essential: 'We just could not afford to stay in the digital business.'

Heidelberg's core business now comprises sheet-fed offset presses, Prinect pre-press workflow systems, paper cutters, folders and binding systems. A new venture is to introduce full JDF connectivity from pre-press through to finishing. In our industry, Heidelberg presses are widely used for producing wet-glue applied and paper in-mould labels, as well as folded cartons. The group also retains a highly active 30 per cent share of the Gallus Group.

On an historical note, Wolfgang Gorth recalled the UK's financial crisis in 1975. 'They were really tough times, with a three-day week and a huge loss of working days through strikes. Also, some pundits were making gloomy forecasts about the future of printing. One predicted the elimination of newspapers by 2000, which would also see the arrival of the paperless office. Despite this doom and gloom we eventually grew a turnover of £5 million into a turnover of nearly £160 million today.'

The period coincided with the strong move from letterpress cylinder and platen presses to offset-litho. A landmark event in 1974 was the launch of the 72V, a 10,000 sph four-colour offset-litho press, which helped the process to account for 75 per cent of Heidelberg's UK sales by the mid-1970s. ■

"We have found that only wholly-owned subsidiaries can provide a full sales and service network, especially when complex ranges of pre-press and finishing equipment are included"

Bernhard Schreier, CEO of Heidelberg worldwide

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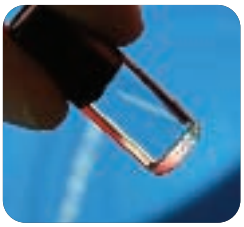




Counterfeiting and Piracy are now said to be the most worrying 'crimes of the 21st century'

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Labeling news

CCL purchases Steinbeis Packaging

CCL Industries Inc has acquired Steinbeis Packaging. Based in Holzkirchen, Germany, Steinbeis supplies battery labels on a global basis and provides premium product decorative label solutions for the European consumer products market.

In July of this year, CCL announced its intention to merge its European and Asian label operations with Steinbeis Packaging to form a new joint venture owned by the two companies. However, it was agreed that an outright purchase of the business would better enable synergies to be developed on a global basis. Steinbeis Packaging has plants in the U.S., France, Germany and China.

CCL Label will continue to build its network and increase investment in its European and Asian label manufacturing facilities, which are dedicated to serving large global customers in the consumer products, healthcare, and premium food and beverage markets. This will include capital investments of Cdn$ 18.5 million to increase capabilities in the fast growing markets of Eastern Europe and China. Construction of two new state-of-the-art greenfield plants is underway in Poznan, Poland and Guangzhou, China, with capacity planned to come on line in the second half of 2005.

Donald Lang, President and CEO of CCL Industries commented, 'We are very pleased to continue building our global position in the highly fragmented label industry. This transaction accelerates CCL Label's strategy of servicing our customers on a global basis and transforms our current business into the largest and fastest growing label network in Europe and Asia. Although we will not be joint venture partners with the Steinbeis family in this new structure, we look forward to continuing our excellent business relationship.'

Geoff Martin, President, CCL Label said, 'This acquisition, coupled with the new investments in Eastern Europe and China, will give CCL Label more than 30 sites worldwide in our network and total revenues of approximately Cdn$ 650 million. We will continue to operate as a global Label company dedicated to our largest customers in the consumer products and healthcare markets. However, we will also maintain our philosophy that local management with the autonomy to service our customers daily, close to their facilities in whichever part of the world we are needed, is the path to success in this business.'

Fuji Film acquires Sericol

Fuji Photo Film Co., Ltd. has signed an agreement to acquire Sericol from an investment group led by Saratoga Partners. The deal is expected to close in late February.

Sericol is a producer of premium inks and other consumables for the screen-printing and narrow web industries.

Fujifilm said: 'The acquisition will further expand and develop Fujifilm's printing business, one of the company's core businesses into other areas of industrial and package printing which are expected to grow steadily in demand'. Fujifilm plans to operate Sericol as one of the key business units within its printing business and that its current management, including Chief Executive Ed Carhart, will remain with the company.

Sericol's main manufacturing facilities are in Broadstairs, England and Kansas City, Missouri, USA. It has other plants in Australia, India, China and Brazil, and offices in several other countries.

Nestlé implements Certified PDF

Nestlé has successfully implemented a Certified PDF workflow for its packaging operations, and will explain the benefits at a conference in Brussels in early March. 'The completion of trials at Nestlé France with a major design agency and two pre-press houses have been so successful that Nestlé is considering expanding the use of Certified PDF to include all its European subsidiaries,' says Christian Blaise, Nestlé ebusiness project manager.

'The benefits we have experienced convince me that what we have achieved in France will be copied throughout the packaging industry. In the trials that we have conducted, benefits have included a huge reduction in errors and the number of transmission of files required between designer, brand owner and pre-press house. There has also been an increase in productivity, resulting in a faster route to market, and the ability to monitor and track all job changes as and when they occur. We have all been delighted at the decrease in the number of meetings required to progress a packaging job and by the fewer production problems encountered. Certified PDF has broken the barrier between design and production.'

The international conference, hosted by Artwork Systems, will be held in Brussels on March 3rd and 4th to examine the impending impact of Certified PDF on the packaging market and launch PA:CT – Packaging:Certified Technology. Speakers at the conference, which is free to attend, will include representatives from Nestlé and German converter August Faller GmBH, which has also implemented Certified PDF.

Artwork Systems' Enfocus division pioneered Certified PDF technology.

Multi-Color acquires NorthStar Print Group

Multi-Color has acquired NorthStar Print Group, Inc., the label manufacturing subsidiary of Journal Communications. The purchase price was $27.03 million in cash.

NorthStar has annual revenues of approximately $60 million. It employs approximately 275 people and has three manufacturing locations in Watertown, Wisconsin, in Green Bay, Wisconsin and Norway, Michigan. NorthStar was founded in 1878 and acquired by Journal Communications in 1966.

Multi-Color president and CEO Frank Gerace said, 'NorthStar will be Multi-Color's seventh and largest acquisition since 1999 and represents a major milestone in our history. Like Multi-Color, NorthStar is a highly developed, technologically advanced provider of label and decorating solutions to major beverage and consumer products companies worldwide. Adding NorthStar's capabilities to Multi-Color brings important new dimensions to our product and market mix and further increases our leadership position as a full-service decorating solutions business.'

NorthStar Print Group specializes in the production of gravure and flexographic pressure-sensitive labels.

Paxar and CDO Technologies partner

Paxar Corporation has entered into an agreement with CDO Technologies, Inc. to provide RFID solutions, including printers, labels, test facilities, technical support and related services to improve government asset tracking and enable government suppliers to meet Department of Defense RFID mandates.

This agreement will make it possible for government agencies to purchase Paxar's Monarch brand RFID equipment and services from the CDO Technologies General Services Administration (GSA) schedule.

'Paxar is a recognized leader in Radio Frequency Identification (RFID) encoding and smart label technology. By offering Paxar's proven line of Monarch RFID solutions, CDO Technologies will be able to quickly meet both government and supplier RFID requirements,' said Al Wofford, President of CDO Technologies.

'Our combined experience in distribution, depot maintenance and manufacturing environments makes this the perfect partnership to deliver solutions for today's RFID compliance initiatives,' added Kathy Coleman, Paxar's RFID national sales manager.

UPM Converting appoints business

UPM's Converting division now consists of two businesses, Labelstock and Speciality Coatings. Heikki Pikkarainen has been appointed president of the Labelstock business and member of UPM's Executive Team. The Labelstock business consists of the self-adhesive labelstock manufacturer Raflatac and UPM Rafsec, producing and developing radio-frequency identification (RFID) labels and cards. Pikkarainen currently works as vice president, Strategic Development for UPM. He will report to Jussi Pesonen, president and CEO

Tarsus launches India Label Summit 2006

Tarsus Group plc, organizers of the Labelexpo series of events, is launching a major program of education, training and support to help develop the fast evolving Indian label market.

The program will commence with a keynote Label Summit in Mumbai on 21-22 February 2006. This first event is being jointly developed with the Label Manufacturers Association of India (LMAI) and leading Indian label converters. It will bring international label industry suppliers, label converters and key end-users from the branded goods, retail groups, consumer products and distribution sectors in India together to educate and train all levels in the label supply and usage chain

The Label Summit conference program in Mumbai will address these issues with high level Indian and international speaker sessions chaired by label expert Mike Fairley, an extensive table-top exhibition area and a number of special practical masterclasses on key topics.

Roger Pellow, Labelexpo Managing Director says: 'By bringing together in Mumbai key label technology suppliers, label converters and label users from the food, cosmetics, toiletries and pharmaceutical sectors we aim to highlight the potential of high quality added-value label solutions that sell products, build brand loyalty and improve performance and profitability throughout the whole label manufacturing and usage chain.'

Mark Andy's New LP3000 enhances productivity with flexibility.

Mark Andy sets the standard in label and tag printing productivity with its proven "QC" Quick Change technology. It also sets the standard for flexibility allowing changes from foil to screen, lamination, embossing and many other options in-line. Now the LP3000 raises the standard to an even higher level of productivity. With a new Quick Load/Quick Set plate roll loading system, an improved high impact drying system and features that save material and set-up time, the LP3000 delivers superior quality up to 230m/min.

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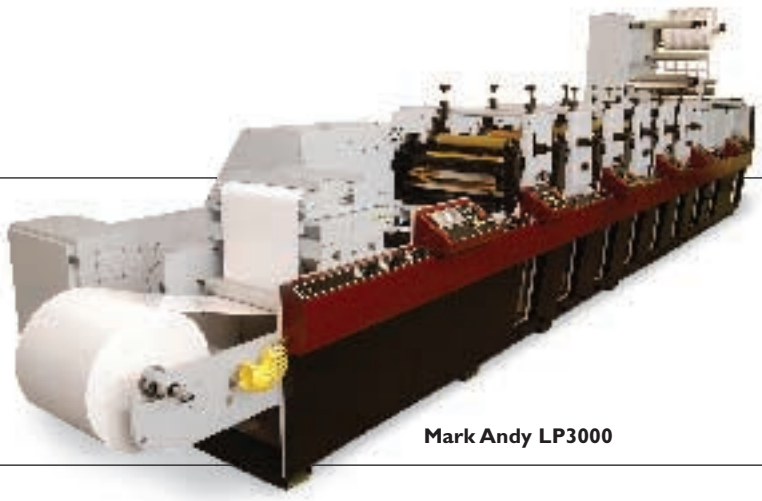

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Book review

Lara Moutin, Unilever Home and Personal Care Division, Global Supply Management Director Flexible Packaging

Encyclopedia of Labels and Label Technology

I read carefully the Encyclopedia of Labels written by Mike Fairley. At last, we have a comprehensive reference resource to de-mystify the jargon. For a supply manager of labels, this type of book is a great enabler to communicate properly with the converters, especially if someone is new in the job (which is often the case). We all know that the basis of a good communication is to articulate properly and simply a concept and to put the same meaning behind the same word.

Mike has used all his extensive knowledge and experience to give a clear and understandable manual on labels: the definitions are clear and the diagrams convey the right message.

The next generation would be to put this reference book on-line and link it to more interactive descriptions (e.g. film clip of an offset press, operators setting up presses etc.). In parallel, it would be fantastic to translate it into Spanish and Mandarin.

I am recommending it to my global team and to my innovation Colleagues around the world. Mike – Well done. Again.

Australian dates confirmed

Finalising of 'The Great Grape Escape - Adelaide 2005', the LATMA Australia National Conference from the 7-10 April, is now taking place. To be held at the Novotel Resort, Barossa Valley, Adelaide, the conference has two themes, with the educational part of the program being under the title of 'Change and the Future'. Returning this year as a guest speaker on the topic of 'The Future of Label Converting' is Mike Fairley.

The conference runs from the evening of Thursday 7th April and concludes after breakfast on Sunday 10th April.

For a registration form for the Conference and to receive further information about the conference and the associated exhibition visit the LATMA web site (www.latma.com.au).

LATMA, the Label and Tag Manufacturers Association of Australia Inc, is the national body that represents suppliers and converters of self-adhesive labels, materials and labeling equipment in Australia.

Labelexpo China grows into Labelexpo Asia

With the increasingly rapid growth of the Chinese label market and the expanding presence and sales of international label industry suppliers in the region, it has been decided that the Labelexpo China show will become the main show for the Asian market and in future be known as Labelexpo Asia. 14 per cent of attendees to the previous event in 2003 were already international visitors.

Labelexpo Asia now joins the two other major global events (in Europe and the Americas), complemented by Label Summits in the emerging markets of Latin America, South East Asia and India as well as specialist conferences in Japan and a new event in the USA Smart Labels (in partnership with IDTechEx).

This decision also follows the recent announcement that the final Labelexpo Singapore has now taken place and that in future Labelexpo's South East Asia event will become Label Summit Asia 2006, which will be held in Bangkok as a high level conference supported by a tabletop exhibition.

Labelexpo Asia, being held 7-9 December 2005 in Shanghai, looks set to be at least double the size of the previous Labelexpo China and is now rapidly attracting increasing numbers of label industry global suppliers as exhibitors. Labelexpo Asia will be marketed extensively throughout China and the whole Asia region and this is expected to bring in visitors from as far afield as Australia, India, Malaysia, Philippines, Thailand, South Korea, Taiwan, Singapore, New Zealand, Japan and Indonesia.

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Sun Chemical raises prices on European inks

Sun Chemical has implemented price increases of 4 to 8 per cent on the sheetfed inks and coatings used for wet glue label printing in Europe. Felipe Mellado, Sun Chemical Corporate vice president Europe, commented: 'Due to the current imbalance in the supply and demand of many of the raw materials used in the formulation of printing inks and coatings, Sun Chemical has had to accept multiple price increases over the last months while also dealing with shortages and allocations on some raw materials.'¶

Mellado said the underlying factors of this imbalance include strong worldwide demand for specialty chemicals, high oil prices, inflation, poor profitability of the chemical industry and as a consequence, a lack of investment in new capacity. 'This problem is further compounded by the fact that we are facing increasing cost pressure from environmental compliance, transport, packaging, and other inflationary operating cost increases.'

The British Coatings Federation (BCF) has meanwhile posted a price warning on behalf of its 25 member companies, who are the UK's leading manufacturers of printing inks and related coatings. BCF chief executive, Moira McMillan comments, 'sadly we seem to be in a new era when increasing raw material costs appear to be with us for a long time to come. Further rises for gravure and flexographic printing inks are inevitable.'

Smithe moves Aquaflex to Pennsylvania

F.L. Smithe Machine Company has announced that Aquaflex manufacturing operations are moving to its Duncansville, Pennsylvania plant. 'The move will simplify operations and it should be completed in the early first quarter of 2005,' said Mac Rosenbaum, vice president of F.L. Smithe. 'We will continue operations in Montreal until the transition is complete so there will be no interruptions in new press deliveries. The Montreal operation will continue to provide engineering and technical services and work closely with our engineering team in Duncansville. Product support will be provided from both Montreal and Duncansville.'

F.L. Smithe, a leading manufacturer of automated envelope converting equipment worldwide, purchased the assets of Aquaflex in March 2004.

'The Aquaflex name has always stood for innovation and high-productivity and that tradition will continue,' said Rosenbaum. 'This is not a side-venture for F.L. Smithe—we view Aquaflex flexographic printing products as a very important part of our future. That means we will apply the resources necessary to make Aquaflex an industry leader. This should be good news for existing Aquaflex customers because it guarantees continued product support and a solid upgrade path in the future.'

Creo and DuPont join proofing technologies

Creo and DuPont Imaging Technologies are initiating new joint development and sales activities in color proofing. DuPont Imaging Technologies will deploy its CromaNet color management, together with Cromalin ink and media, on the Creo Veris proofer. Work is underway to complete development of this Cromalin Veris proofing solution, which will be available through DuPont sales channels.

'The Creo Multi-Drop Array imaging technology used on the Veris proofer delivers precise control of its 3 pL ink drops to produce superior-quality inkjet printing,' explains Paolo A. Barbieri, global business director, DuPont Color Communication.

Amos Michelson, Creo chief executive officer, comments, 'This work builds on the strong relationship we have established with DuPont Imaging Technologies in the provision of thermal digital halftone proofing systems and consumables and the development of color filter manufacturing systems for the flat panel display industry. Both Creo and DuPont Imaging Technologies have a strong history of leveraging one another's technical excellence.'

Creo will continue to sell Veris proofing solutions, complete with Creo ink and media and direct connectivity to Creo Prinergy and Brisque prepress workflows, through Creo sales channels.

DuPont Imaging Technologies and Creo are also starting evaluation of a new version of the DuPont Cromalin b2 drop-on-demand inkjet proofer that will be integrated with Creo workflow, color management and consumables.

Labeling news

OPM targets flexible packaging niche

UK-based converter OPM has invested almost £1M in a Nilpeter FA 3300 S press.

The expansion in press capacity was prompted by the company's success in several niche flexible packaging markets, especially pouches, sachets and similar products made from mono and laminated film substrates. In addition, OPM produces high-quality paper and filmic self-adhesive labels for the health and beauty sector.

The latest specialisation is to produce self-adhesive labels for the premium bottled beer market, using metallized substrates and special inks, as an alternative to traditional wet-glue labels.

Says md Chris Ellison: 'The FA3300 S is equipped with synchronized servo drives rather than a mechanical shaft to allow even faster set-ups. Press operators can quickly pre-set all the main process and production parameters using digitized controls. Synchronized drives also facilitate the processing of difficult pressure-sensitive paper or filmic label stocks, as well as unsupported films and foils, with variable repeat lengths.'

Founded 32 years ago, OPM has seven other Nilpeter presses from a relationship dating back over 14 years. Chris Ellison comments: 'Our original FA-3300 has enabled us to produce high end film-based label and packaging products in new markets.'

Wine collection

In November, Manter presented its exclusive collection of paper for wine labels at the Labels Africa fair in Cape Town, South Africa, where the wine producing sector is currently enjoying a boom.

'Despite attendance at the fair not being as high as expected, the presentation of the new product range through the Wine & Spirit Label Collection Gold Edition catalogue achieved its aim, receiving a very warm welcome in one of the most important markets in the word in this sector,' said the company. The collection is made up of 73 front labels and matching adhesives.

Graficon installs three presses in East Europe

Graficon Maschinenbau has installed three letterpress combination presses into Eastern European label converters.

A 340mm combination machine has been installed at Levprint in the Ukraine, mainly to produce complex self-adhesive labels for beverages. Substrates are being printed, laminated and joined to a special multi-layer product.

Label Design in Tchechia has installed a machine with a 210mm web width to produce small runs which cannot economically be produced on its existing offset machines. On the same machine also various special labels such as booklet-, multi-layer labels and labels with hologram application are being produced.

The situation in Slovakia is similar. 'There is also an increasing demand for more economy, quality and specializing,' says Graficon's Martin Erni. 'Etis in Slovakia has the same requirements as his competitors in other countries and has therefore decided for a solution from Graficon; the ordered combination machine with 210mm web width, in almost the identical configuration as his competitor's, will be installed soon.'

The installed machines are based around combination letterpress, screen, UV, flexo, hotfoil and are designed for small and medium size runs.

Cargill takes Dow share

Cargill has acquired The Dow Chemical Company's interest in Cargill Dow LLC, the 50:50 joint venture formed in 1997 to commercialize polylactic acid biopolymers. Terms were not disclosed. The transaction is subject to regulatory approval in Europe.

Cargill is the original inventor of polylactic acid (PLA), a polymer derived from natural plant sugars and marketed by the joint venture as NatureWork PLA and Ingeo fibers. NatureWorks PLA is used in a broad range of packaging applications including labels for companies seeking plastics made from an annually renewable resource.

At the same time, research has indicated that NatureWorks PLA will segregate from PET bottles in a waste sorting system.

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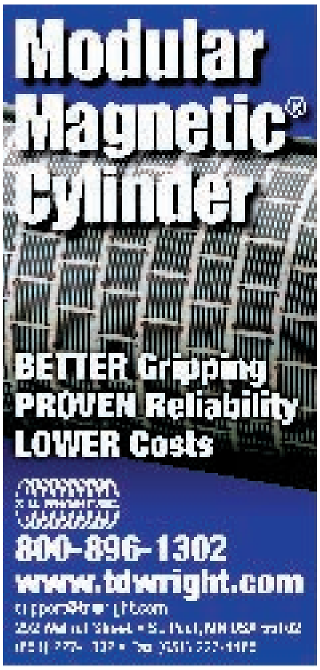

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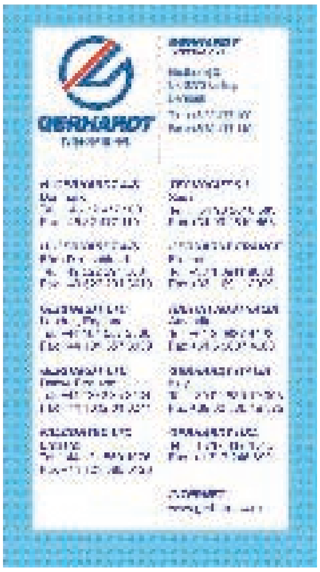

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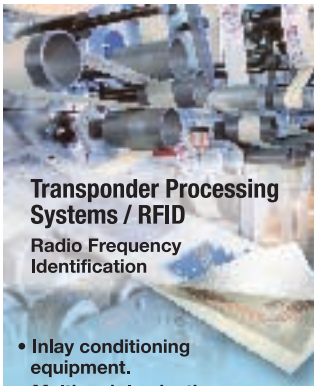

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