

Labels & Labeling

The wider world of narrow web

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Feb/Mar 2006
Issue 1 Volume 28

Labelexpo



Labelexpo Asia – what are the new developments in the Chinese market?

Analysis



GIDUE forms alliance with rotary offset specialist Castagnoli

Digital



Jetrion enters inkjet race with launch of standalone digital press

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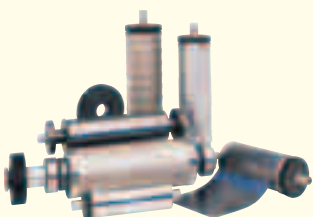
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Leader



This edition of *Labels & Labeling* contains two articles which point the way to an interesting future world. My colleague Mike Fairley has just completed research with the two manufacturers of industrial digital labels presses - HP Indigo and Xeikon (see p.6) - which shows that last year, 10 per cent of all label presses installed globally were digital.

This is an extraordinary landmark for those of us who have followed digital label printing from its first introduction in the mid-1990s. The first generation of Indigo machines were not industrially robust for the demanding PS labels environment. Meanwhile Xeikon's business model left it competing with its own OEM partners and left many printers struggling with inadequate technical support. With Xeikon in liquidation, it looked like the digital dream was over.

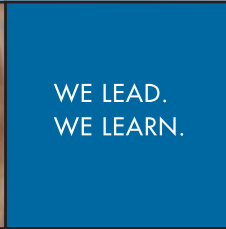
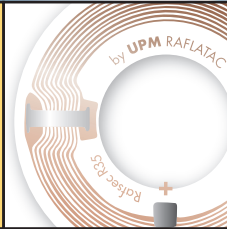
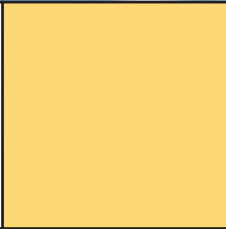
“Recently completed research with the two manufacturers of industrial digital labels presses – HP Indigo and Xeikon – showed that last year, 10 per cent of all presses installed globally were digital”

But Indigo's acquisition by Hewlett Packard, along with the new 'ws' generation of industrially robust digital presses, turned around HP Indigo's fortunes. At the same time, Xeikon received the full backing of the global Punch Graphix group, significantly modified its print engine and web handling system, and put in place proper technical support.

As a result, Mike Fairley is predicting that close to 14 per cent of all narrow web press installations will be digital by 2007.

Our second digital feature announces the launch by Jetrion of a digital inkjet label press. I reported last year on the success story of multi-color inkjet printing with the Mark Andy DT2200 at Stralfors in Europe, and asked why this technology has not penetrated further into the labels sector. Although nowhere near the print quality of a Xeikon or HP Indigo press, inkjet is 'good enough' for a whole raft of new digital applications where the highest print quality is not an issue. With both Jetrion and Agfa – which bought out the Barco 'dot Factory' technology – now pushing hard on the narrow web inkjet front, it will be interesting to see where this goes over the next couple of years.

Andy Thomas
Group Managing Editor



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Labels & Labeling Exclusive

Digitally printed labels achieve key milestones



Based on exclusive data provided by HP Indigo and Punch Graphix **Mike Fairley** provides a state-of-the-art review of digital label printing and looks at future growth and trends

The year 2005 proved to be something of a momentous time for digital label printing, with a number of key milestones being achieved – in total digital label press installations, in the annual volume and value of labels printed digitally, and in the percentage growth of digitally printed labels.

For HP Indigo, total installations of their Series 2 (ws4000/ws4050) presses since they were first introduced to the market in March 2003 have now topped 200; 100 of those in 2005

“In volumes and values for digitally printed labels, around 4.0 billion labels are calculated to have been printed digitally in 2005, between them having an estimated sales value of over a quarter of a billion dollars”

alone. Put together with the 30 ws2000 presses also installed in 2005, plus 15 installations during the year of the new Punch Xeikon digital label presses, and the total number of digital label presses installed in 2005 was, for the first time, around 10 per cent of all narrow web presses installed globally in one year.

In volumes and values for digitally printed labels, around 4.0 billion labels are calculated to have been printed digitally in 2005, between them having an estimated sales value of over a quarter of a billion dollars. The number of labels printed digitally on HP Indigo presses in 2005 alone were up some 137 per cent on 2004.

Business plans for 2006 already indicate that well in excess of 200 digital label presses (170 + HP Indigo and 30 + Xeikon) are expected to be installed during the coming year and even more in 2007, with some of the highest growth in the coming years being in the Asia Pacific region.

By the end of 2007 the comparable figures are forecast to be

for more than 7.7 billion labels being printed digitally (valued at a near half a billion dollars) and for digital label press installations in 2007 to be close to 14 per cent of all new narrow web label presses installed in that year. Quite some achievement.

Having said that, it will have taken some 10 years since digital label printing technology was first introduced to the label market at Labelexpo in 1995 to achieve these key milestones. However,

much has changed since those first generations of digital label presses were installed during the later half of the 1990s. Digital presses today are built like printing presses, rather than being more like office-type machines. They are faster, more reliable, have a considerably higher output and much higher breakeven point against conventional printing technologies.

Up to 7-color digital machines have also substantially improved the ability to print brand and house colors alongside 4-color process in one press pass. Additionally, most of the issues relating to color mixing and matching have been resolved; so too have the problems of ink key, pick resistance and consistency.

Work is still ongoing to provide better white inks, improved metallics, automated workflow options, MIS connectivity and other enhanced options, while digital press partners, such as Esko Graphics, Artwork Systems, AB Graphic Machinery and Rotoflex, are working to further refine areas such as the digital front end, pre-production, editing tools, color accuracy and a

wider range of finishing options. Further developments by Esko Graphics are in areas such as digital asset management and supply chain integration solutions, while work continues to improve the cost-effectiveness and benefits of digital laser die-cutting.

Certainly, there can be little doubt today that the digital printing of labels on the latest generation of digital presses launched over the past three years is now a key mainstream label printing technology – just as rotary screen printing of labels is – that is accepted by thousands of end-user customers for all kinds of applications and in a wide range of run lengths. With further refinements, and the new tools being developed, digital label printing will become even more attractive to label converters and end users.

Look at the types of labels currently already being produced by label converters with digital presses and it ranges across markets as diverse as pharmaceutical, hygiene, health, vitamins, chemicals, wine, food, beverages, memory sticks, paints, inks and security applications – with a few digital presses also producing very specialized products such as self-adhesive postage stamps. While the vast majority of the labels being printed digitally are self-adhesive, there are also now digital presses printing wet-glue labels, shrink-sleeve labels, wrap-around film labels, in-mold labels, tags and flexible packaging.

Run lengths printed on digital label presses have also changed significantly in recent years since the Series 2 HP Indigo presses were introduced. Over the first five or six years following the introduction of digital presses in the mid 1990s the average run length of digitally printed labels was commonly less than 1,000 labels.

Today, there are label converters competitively printing (against other label printing processes) digital labels in run lengths up to 10,000 or 15,000 labels, with some still

“Certainly, digital label printing today is not just about short-run printing; it is all about the advantages and benefits it can provide to customers”

competitive digitally in run lengths up to 50,000 labels.

Other HP Indigo users talk in terms of linear meters of printed labels, with the breakeven point for the ws4000 presses typically being up to 2,000 to 2,500 running meters (where flexo probably starts to become more competitive), but can sometimes be as high as 12,500 linear meters, depending on the nature of the job. For those with Xeikon presses the average is for 4,000 to 5,000 square meters of labels to be printed a day

Certainly, digital label printing today is not just about short-run printing; it is all about the advantages and benefits it can provide to customers, the systems savings it can offer, the added-value benefits, or the solving of specialist and niche requirements. Typical solutions might be where there are lots of different designs of labels, perhaps on many different sizes of containers, or special batch printed jobs, long-runs of variable data labels, or the servicing of customers that require both a digital and flexo label printing capability. Some converters are also now moving into facilities management for their key clients.

Interestingly, it is not uncommon for digital label converters to not even tell their customers that a job has been printed digitally, while others will cost each job for both digital and conventional printing technology – and let the customer choose on price and quality;



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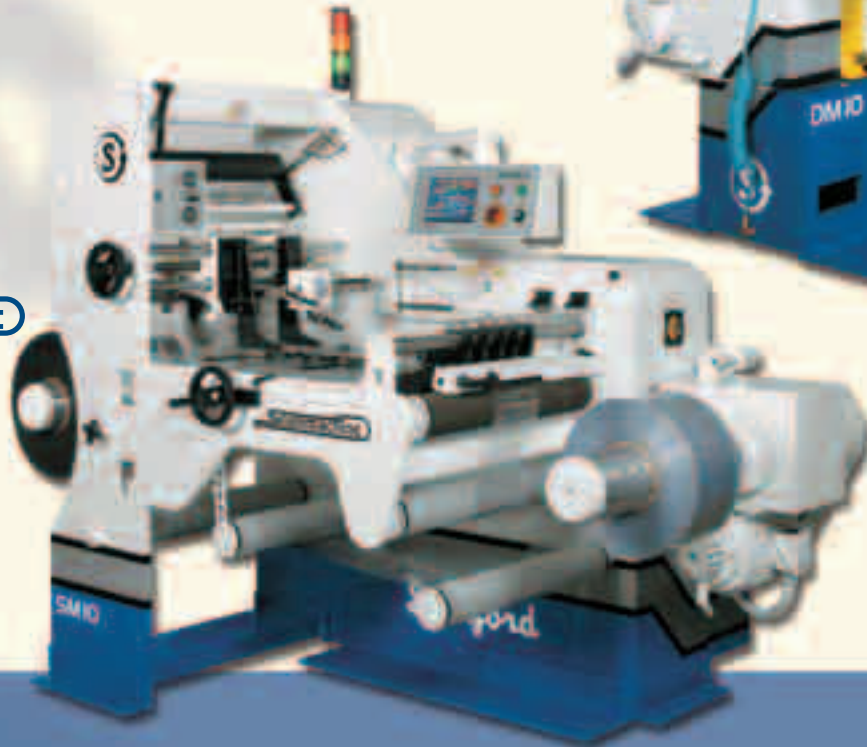


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frequently, digital printing will be the winner. Yet others use digital printing where it can be sold as a real added-value benefit or, in some cases, by also using their digital presses whenever possible as a relief for conventional printing when their flexo presses are already at full capacity.

In many cases, digital printing can be better sold – and generally more profitably – if the converter can get to talk to the brand or product manager, rather than to a label buyer, with digital promoted a key solution that can be used to enhance the image or brand quality. The key challenge is to sell quality, added value labels, rather than to talk about any print technology or to compare with any other print process. Those that have chosen this route to servicing customers with digitally printed solutions certainly seem to be doing very well.

Looking ahead, and based on current levels of growth for digital label printing, forecasts for digital label press installations by 2010 could be approaching 20 per cent or more of all new label press installations, and with more than 15 billion labels being printed digitally each year.

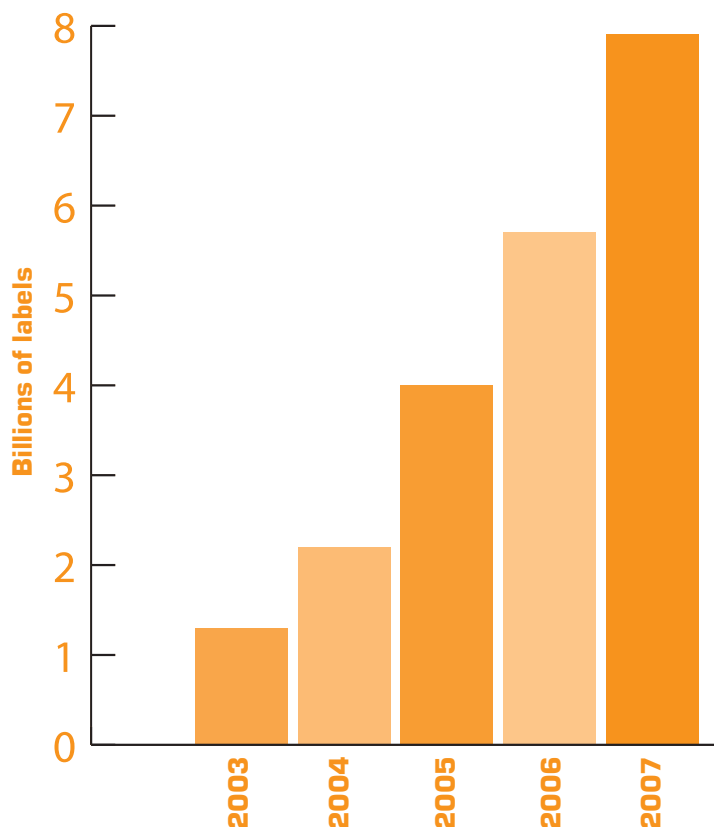
For HP Indigo, already in the top handful of global label press suppliers, the next few years are expected to see them move ahead of most conventional label press manufacturers to become the number one or two label press manufacturer in the world. If that can be achieved within 12-13 years of the first digital presses being sold it will be a remarkable achievement – and one which will fundamentally change the

“Digital label press installations by 2010 could be approaching 20% or more of all new label press installations, and with more than 15 billion labels being printed digitally each year”

future of the way labels are printed and sold. Xeikon too, are again successfully competing in the world of digitally printed labels and will continue to make their mark in the future.

Undoubtedly the long expected revolution in label printing with digital solutions – from design, through pre-production to printing and finishing – has well and truly arrived. Having said that, digital label printing will not replace conventional label printing with flexo, UV flexo, letterpress, offset or screen in the immediate future. But it has become another mainstream printing process which has a key role to play in the label industry, can provide solutions where other technologies will strive to compete and, more importantly for those that have invested in digital printing equipment, now offers a good return on investment. ■

Estimated number of labels printed digitally. Billions of labels 2003-2007



Correction

Due to an error in printing the cover of the December/ January issue, we regretfully omitted the last line of text in RotoMetrics' advertisement. The last sentence should have read: "And for unsurpassed consistency and easy ordering for ages to come, choose RotoMetrics magnetic cylinders." The correct version of the ad can be found on Page 1 of this issue.



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Jettrion pushes inkjet revolution

Inkjet specialist Jettrion is on the verge of a very big year. 2006 will mark the launch of a secret new project and also a real-estate move into its own purpose-built facility. **Katy Wight** reports

As a wholly-owned subsidiary of Flint Ink, Jettrion has already seen a great deal of change in the past year. In August 2005, European-owned Xsys Print Solutions acquired Flint Ink of Ann Arbor, Michigan, making both companies majority-owned by private equity firm CVC Capital Partners. Jettrion president Ken Stack believes that the merger can only have a positive impact on Jettrion. The company provides a combination of ink, hardware, software, and integrated solutions for continuous inkjet (CIJ) and drop-on-demand (DOD) printing applications and has a well-established presence in the wide-format billboard and mailing markets, but Jettrion sees packaging and labels as the real growth potential.

‘Our new relationship with Xsys Print Solutions will be a very useful connection with the labeling community,’ says Stack. ‘Flint Ink had moved away from the narrow web market, but Xsys has the number one share of the narrow web market in Europe.’

This connection will definitely come in handy with the launch of their latest new project. Jettrion has exclusively revealed to *Labels and Labeling* that it is planning to launch a full-color standalone digital label press at the end of 2006 – the Jettrion 4000 Series. Jettrion intends the first few presses to be custom manufactured for specific clients, but Stack explains that the standard press will have a web widths ranging from 4” to 8” and use DOD grayscale Xaar Leopard inkjet heads.

‘There is great potential for a digital press of this kind,’ says Stack. ‘Current laser-based digital color label presses tend to have prohibitive running costs except for extremely short runs. And even as users improve efficiencies through increased use of these machines and compete more against one another, click charges will always make it difficult for label converters to make reasonable margins on digital print jobs. With the Jettrion 4000 Series,

label converters will have the flexibility to buy a single consumable, ink, and compete as they always have. Initial analysis by an outside party has shown our running costs are expected to be about half the cost of the color laser machines.

‘Furthermore, while laser printers have excellent quality, you pay for it, and many jobs just don’t require that kind of quality. We are not competing directly with laser printing – the Jettrion 4000 is perfectly positioned for the secondary label and industrial market.’

The company believes that the 4000 will achieve the same kind of response from the narrow web market as its hybrid 3025 model. Since the launch of the company two years ago, Jettrion has installed 40 hybrid inkjet printers on-press worldwide, but sales are accelerating and it aims to hit 100 sales by the end of this year. Currently, 80 per cent of sales are within North America, indicating a big potential from other markets in Europe and Asia.

The 3025 is a DOD variable data printer that can run in-line with a press. As thermal transfer solutions are generally limited to an offline process, the 3025 has an immediate advantage. The Jettrion system can run far faster than TT equipment and Jettrion claims that operating costs are more economical. The 3025 can also achieve higher resolution, it works on virtually any substrate – whether coated or not – and print has a glossy finish. Jettrion also claims that



Mounted inline, the Jettrion 3025 adds variable data to labels

About Jetrion

In February 2003, Jetrion LLC was founded by Flint Ink Corporation to provide high performance inkjet inks, printing systems, and integration services within the industrial printing markets. The new unit grew out of Flint Ink's Digital Division, which had been in the digital printing market since 1994. Jetrion's team of digital printing professionals is dedicated to the advancement of a broad range of inkjet printing technologies.

the system has significant advantages over toner-based ion deposition variable data printers that can also be mounted inline. The company says that the 3025 is faster and more reliable than toner-based equivalents.

Feedback from converter users is also very positive. Jetrion approached Whitlam Label of Center Line, Michigan, to beta-test the 3025 and the company has since bought a second unit. Located near Motor City, Whitlam has been servicing all of the major auto OEMs since the 1980s and now also supplies to their tier one component suppliers. The automotive industry is tough to work for. Since Detroit's heyday in the 1950s, intense competition from abroad and globalization have created an aggressive, just-in-time supply and manufacturing culture and the OEMs can't afford those production lines to stop. Just like engine or transmission suppliers, Whitlam Label is accountable for the performance of its product and if something goes wrong,


significant penalties can occur. If a converter supplies a parts marking label that can't be scanned and read, it can be very expensive financially – particularly if it's a two cent label that has caused the problem.

Concentrating on the durable market, Whitlam's auto jobs are predominantly three colors or less, but must withstand some of the harshest environments going. The company mounted its first Jetrion 3025 on a Mark Andy press.

'The Jetrion 3025 produces much less waste and runs much more smoothly than the ion deposition equipment we have been using,' says Whitlam operations manager Don Clifford. 'It's also much faster. We are running at around 250ft/min, as opposed to 95-100ft/min with the toner-based system. With the ion deposition system we weren't able to print higher density barcodes, but we can achieve twice the resolution with the 3025. The inkjet print has also proved to be more durable than the toner-based equivalent and doesn't flake off the substrate, even under extreme conditions.'


Whitlam was so impressed with the 3025's capabilities that they recently installed another unit on a second Mark Andy press with extra stations and broader capabilities. Throughout the initial trial phase, Whitlam and Jetrion worked closely on improvements to the operator interface, and in matching inks and materials.

'Whitlam taught us the need for a custom ink program,' explains Jetrion president Ken Stack. 'At the launch we had a single ink for most substrates, but we soon realized that we




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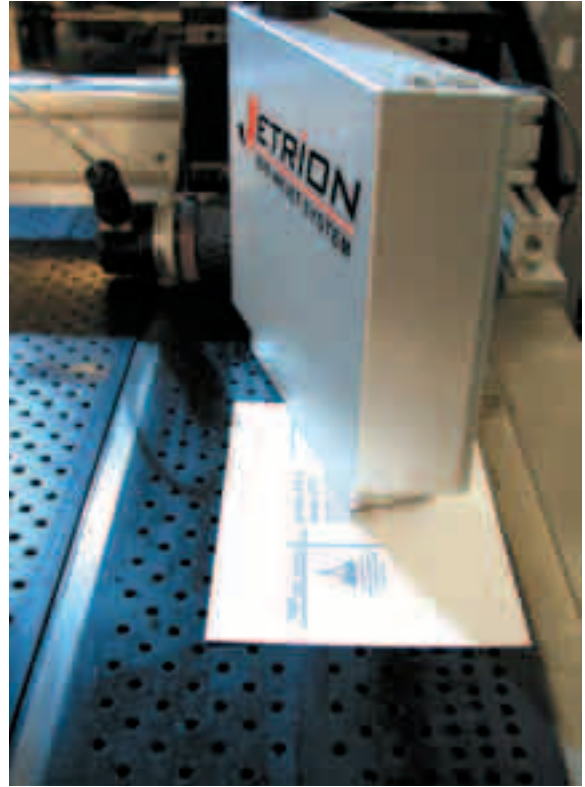
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needed more. Whitlam would send new substrates every week for us to work with, so now we will research and formulate new inks for different applications on request.'

Jetrion has plans to launch a new configuration of the 3025 at IPEX. By building the 3025 into a label rewinder, converters will now have the opportunity to run the 3025 offline or in-line, depending on application requirements. Jetrion believes the off-line unit offers flexibility for converters who struggle to install the unit on a single press. By running off-line, a converter can imprint barcodes, numbers or text onto a roll of labels coming from any press in their shop. Dr. Stack is inviting prospects and the media to visit the IPEX demo in the Flint Group/Jetrion booth in April in Birmingham.

Jetrion has been working hard to improve its service to customers and has recently formed a number of partnerships to broaden the company's experience. Jetrion is working with SIRA Technologies on the development of thermochromic inkjet inks and has an alliance with Advanced Electron Beams for the development of electron beam curing technology. With all of these new projects, it's a good thing that the company is moving into its own purpose-built facility. The new plant will triple Jetrion's manufacturing space and give them a new testing and demonstration center.

'Three years into our business plan, our growth is right on target,' says Stack. 'With the establishment of the Jetrion 3025 as the leader in spot color variable printing for labels packaging, and the coming release of the 4000 full color printer, we feel good about our prospects to fill the new factory space with manufactured printers and inks for our growing customer base' ■



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Labeling news

First Indian screen engraver installed

Stovec Industries Ltd Ahmedabad (Gujarat/India), supplier of screen and flexo printing consumable products, has set up the first engraving and re-imaging service for narrow-web electroformed nickel rotary screen cylinders in India.

The engraving facilities, supplied by Stork Prints, are based on the exposure method, and will support users of Stork's RotaMesh screens.

The company said in a statement: "The service enables India's narrow-web printers to get their screens engraved at lower cost and faster than was previously possible. There is no need to import screens from abroad and pay expensive duties; furthermore, lead-times are as low as three days. As a result, users of the nickel rotary screen will be able to benefit more from the cost-savings the format offers, namely a long life and the ability to withstand many engraving cycles."

Kaushik Magiawala, from Stovec Industries Ltd, commented: "There is strong growth in demand for screen-printed labels in India. It's fuelled mostly by the major grocery, cosmetic and pharmaceutical manufacturers, who want consistent standards of presentation globally. The opening of this engraving service enables the country's label converters to provide a local source of high-quality labels, much more competitively, and with greater flexibility than before."

The announcement follows a series of narrow-web rotary screen installations in the country. In Mumbai, the converter Essel installed a 10" RSI (Rotary Screen Integration) unit on their Ko-Pack press; also, Maharshi (Ahmedabad) and Pragati (Indore) have acquired Stork's light, Easy Fit unit for their flexo presses. Update (Delhi) is in process of installing the RSI Compact model on a Rotatek press, while Meena Printech (Mumbai) is also planning to buy a Nilpeter machine, with a screen head.

Ger Roza, sales manager for Stork Prints, added: "The cost of ownership of the rotary screen printing process is falling. Not only is it less costly to get hold of the consumables, but new small-size units have been launched that help label printers gain a faster return on investment. These factors will drive up the use of rotary screen printing in India."

Paxar alliance delivers turnkey mattress labels system

Paxar Corporation has teamed up with Ultra Distributors, Inc. to develop a complete mattress labeling system. The partnership allows customers to print mattress labels in their own plants, affording greater flexibility, faster turnaround time and lower cost.

"This partnership allows us to offer customers a complete turnkey system comprised of labels, ink ribbons, machines, and software," said Chris Eng, product manager for Paxar Corporation. "Together, we are installing printers, training staff, and offering long-term maintenance and service packages to the world's major retailers, brand apparel companies and contract manufacturers."

Included in the comprehensive labeling system are Paxar's 910RFS satin label cloth, which has the feel, look, and color of satin polyester tape but does not fray when cut. This cloth, along with Paxar's thermal transfer ink ribbons, is available in a wide range of colors.

Paxar's 636 or 676 thermal transfer printer is also included in the labeling system. The 636 printer has one 300 dpi print head and can print up to seven inches per second, while the 676 printer has three 300 dpi print heads and can print up to five inches per second. Both models offer high productivity and exceptional print quality on a variety of materials including heat seal fabrics, pressure sensitive supplies and shipping labels.

Rounding out the labeling system are Paxar's VantagePoint and PCMate Platinum software. VantagePoint allows customers to receive data, manipulate information and transmit data to remote locations, while the PCMate Platinum software creates label layouts, plugs in variable data from print files and sends data to printers.

News in brief

Flint and XSYS announce new name

Flint Group has been selected as the new name for the holding company created by the merger in late 2005 of European-based XSYS Print Solutions and American-owned Flint Ink Corporation.

Pro Label buys Xpanded Label

Pro Label Inc. has purchased the assets and intellectual property of Xpanded Label Technology LLC.

Pro Label Inc. president Kevin Wichman commented, "We are excited about the growth that this acquisition presents. Our commitment as a trade supplier was one of the key reasons that we saw this as an excellent opportunity for our customers and our company". The Xpanded Label Technology name will be discontinued.

Eckart announces price increase

Eckart has increased prices for bronze powder, pastes and pellets by 8.5 per cent worldwide. The increase for bronze based offset printing inks will be 4.0 per cent and 3 per cent for bronze based gravure and flexo inks. The company claims that the price increases are essential due to the enormous rise in copper prices.

Harlands achieves BRC certificate

Clondalkin group company Harlands has been awarded the BRC IoP Category B hygiene accreditation for its UK and Polish label printing facilities.

Hygiene manager Sue Webster worked on the project alongside Kath Cotterill, Clondalkin group quality manager. An ongoing assessment and training program is aimed at continued adherence and development of the certification.

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Labeling news

WS buys Renaissance narrow-web division

Algoma, Wisconsin-based converter WS Packaging Group has purchased the narrow-web division of label converter Renaissance Mark. The deal includes facilities in Fullerton, California; Monterrey, Mexico; Skokie, Illinois; and Scranton, Pennsylvania.

All of these narrow-web plants have been under the leadership of Bill Harper, who will remain with WS Packaging in that same capacity.

'The Fullerton location will add to our growing West Coast presence and complement the recent acquisition of Ampersand Label in Garden Grove, California,' said WS chairman Terry Fulweiler. 'Of special interest in this transaction is the Monterrey, Mexico facility, which becomes the first international division within WS Packaging Group.'

With its latest acquisition, WS Packaging now has 18 manufacturing plants with projected 2006 sales of more than \$300 million.

FINAT congress looks East

The growing importance of Central and Eastern Europe, both as a production base and a market for self-adhesive labels, is being recognized by FINAT, the industry's trade association, by moving its 2006 congress to Poland's capital, Warsaw.

The three day event – from June 7 to 9 – will concentrate on the opportunities emerging in the region where latest available statistics for self-adhesive labels show a four-fold greater growth record than for the established markets of Western Europe.

FINAT members' contribution to the region's emergence – it ranges from improved production facilities and expertise in those countries to the growing demand from consumers for attractively labeled goods – has been recognized by the Polish government which has promised a high ranking official to give a keynote speech to the delegates.

Apart from the emerging European geographical focus, other speakers will take a look at the situation in Australia and the United States. FINAT's emphasis on excellence will be maintained with contributions from experts on wine labels, marketing and specialization, respectively.

The winners of the industry's 'Oscars' – the 26th annual label competition – will be announced during the associated conference social programmed which will also include the number of optional pre- and post conference events.

NCL installs emission control system

To handle increasing emission volumes in a commercial printing operation that produces more than 14 billion labels annually, NCL Graphic Specialties, Inc., Waukesha, Wisconsin, USA, has installed a new air pollution control system from The CMM Group, LLC, De Pere, Wisconsin.

NCL Graphic Specialties specializes in the production of cut and stack labels and flexographic and custom engineered insert

and insert products for use in food and consumer goods packaging. Previously, three Harris web presses had been connected to an older thermal oxidizer to destroy the VOC's generated from the use of inks, solvents and magic oils used in the printing process.

The company selected The CMM Group to install a 10,000 SCFM regenerative thermal oxidizer to accommodate steadily increasing emission volumes, improve destruction efficiency and reduce energy costs. According to the CMM Group, its RTO unit provides a destruction efficiency of over 99 per cent, exceeding all local, state and federal clean air regulations.

EFI and GretagMacbeth support label proofs

EFI and GretagMacbeth are claiming a breakthrough in the proofing and production of complex, multi-channel color files used in the packaging industry. EFI Colorproof XF directly handles N-color ICC profiles - containing up to six channels - generated by GretagMacbeth's Multicolor and Generic Output Profiler (GOP) technology from the recently released ProfileMaker 5 Packaging. GOP-generated profiles allow the printer to replace spot colors in an existing profile without generating new test charts to reprofile the press. These new multicolor profiles can now be used with EFI technology to, according to the company, consistently optimize all aspects of packaging production, including display-based soft proofing, contract-quality inkjet proofing and high-resolution output.

Colorproof XF is a client/server-based proofing solution that turns inkjet and laser printers into powerful proofing devices. GretagMacbeth announced ProfileMaker 5 Packaging in August 2005 to meet the color management needs of imaging workflow in the packaging market for flexographic, gravure, offset and inkjet printing environments.

Fasson provides hot melt for PET liners

The Fasson Roll North America division of Avery Dennison Corporation has developed technology to provide hot melt products on PET liners. This development is in response to the demand for high-speed labeling, and enables converters to purchase previously unavailable constructions at very cost effective price levels, says the company.

These new products are available in a variety of facestocks/adhesives combinations, including Fasson 60# Semi-Gloss Elite, and Fasson C2500, an optimized hot melt adhesive. Also available is Fasson Exact – a custom service program sizing products to the exact width converters require, resulting in total order cost savings through reduced trim waste.

Domino launches Integrated Solutions Group

With the launch of its Integrated Solutions Group, Domino Printing Sciences Plc has signaled its intention to win a significant share of the fast-expanding worldwide market for product and asset traceability systems, including RFID and other related coding technologies.

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Labeling news

Operating on a worldwide basis, the Domino Integrated Solutions Group will provide manufacturers with a complete range of services to integrate track and trace technology into the supply chain, including total turnkey solutions combining RFID and composite coding with existing manufacturing and distribution systems. The emphasis will be on helping companies assess what RFID and related technologies can offer them to deliver tailored solutions: Domino Integrated Solutions Group customers will have access to consultancy, project scoping, definition, design and management, networking and data management, and hardware/software installation and support.

The group's offering has also been reinforced recently with the appointments of business development managers Gary Page in the US and Tony Walsh in Europe.

Domino has over 25 years' experience in designing and implementing total coding and marking solutions that incorporate not only RFID but also ink jet and laser technologies that apply variable data such as Data Matrix 2-D codes, linear barcodes and traceability codes to products from the pharmaceutical, food, beverage, and other industries. The company also has alliances with leading providers of complementary technology.

Turret Rewinder revisited

Keene Technology Inc. has applied new technology to its JR Series Turret Rewinder. KTI now offers an automatic core loader and a finished roll removal system. The construction and design of the JR Series Turret Rewinder has evolved into a total automation system for the rewinding operation. Automatic tail taping is now available, as well as standard tail gluing and core gluing options.

The JR Series Turret Rewinder utilizes a matched speed splicing technique that allows non-stop production at speeds up to 500 FPM. Industry standard components are used wherever possible for easy maintenance. This unit also includes quick-change pneumatic spindles and a lifetime warranted control board.

The JR Series Turret Rewinder can be configured with 4 or 6 spindles, for web widths up to 16 inches, and for roll diameters up to 16 inches.

Third Edale for Data Print

Estonian label converter Data Print has installed its third Edale flexo press.

Priit Utso, owner/managing director of Data Print, commented: 'Before deciding for the five color UV flexo Alpha press we also looked at larger, modular flexopresses, but realized that our six color E 250S already covers the top end of our label needs. Also, 75 per cent of our jobs need one to five colors, so what we needed was a high quality press for short to medium size production runs. The short web path is a key factor and helps us to keep the waste down and gives us a cost advantage at

the same time. We also anticipate a dramatic increase in production out-put because of the simplified print head design versus the older E 250S. The use of our existing toolings and options and the operator friendliness played another important part in our decision.'

AB Graphic opens mid-West US facility

An Open House hosted by AB Graphic International at its USA location in Elgin, Illinois marked the official opening of the company's newly completed Mid-West facility.

151 representatives from 68 companies attended and experienced live presentations from Hewlett Packard, Avery Dennison – RFID Division, Advanced Vision Technology and A B Graphic International. Representation and support from Rotometric's, Raflatac, Grafisk Maskinfabrik, Esko-Graphics, Sun Chemical, Koehler & Beck and Yazoo Mills reflected the importance of the event.

Topics covered RFID and related converting technology, turret rewinding, converting and 100 per cent inspection rewinding with special emphasis on digital printing and digital converting using the latest technology from Hewlett Packard and A B Graphic International's Digicon Range.

Guest speakers included Paul Mulcahey from California-based Digital Dogma, who addressed important factors for successful digital converting, and Steve Hill from Daymark Food Safety Systems speaking on turret rewinders and how the Vectra range of turrets has met the company's needs for reliable and increased productivity.

Scandstick invests in UK coating capacity

Scandstick UK Ltd, a fast-growing supplier of self-adhesive labelstock, has relocated to new plant at Sawtry, Cambridgeshire, UK. The relocation is also marked by the installation of a new one-meter wide coating line and two new slitters for self-adhesive labelstock. At the same time, the St Neots site and its old acrylic lines have been decommissioned.

With its purely hotmelt facilities on 120,000 ft² premises 70 miles north of London, the Sawtry mill enables Scandstick UK to significantly ramp up its roll and sheet labelstock production.

The new 60 meter (190 ft) long adhesive coating and silicon sing line enables high-speed conversion of filmic and paper roll-laminates, down to 20 µm gauge. Its automated, gravimetric adhesive extruder formulates precise hotmelt recipes 'on-the-fly', minimizing waste and adhesive preparation time.

The installation of this new line means Sawtry can now supply all roll-material requirements from Scandstick's UK and Ireland customers, without the support of the parent company's Helsingborg (Sweden) plant. The UK site will also be the sole production point for Scandstick's TakTik branded sheet labelstock - sold worldwide via a network of Paper Merchants - and for FlatSam lick-and-stick gum-paper sheets, used widely in the retail, promotional and postal sectors. For most products, lead-times are 48 hours maximum, to customers across the UK.



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Labelexpo Asia review

Labelexpo Asia came of age in Shanghai in December, more than doubling visitor numbers and showcasing a wide range of Chinese as well as key Western press, consumables and ancillaries suppliers. **Andy Thomas** reports

Labelexpo Asia 2005, which took place at the Shanghai New International Expo Centre in December, attracted 9,100 visitors from over 70 different countries, making it double the size of the last event in 2003. The show also attracted 150 of the leading international and Chinese suppliers.

Although the great majority of the visitors – 85 per cent – came from China, it was a truly international event, with large delegations from India, Indonesia, Japan, Malaysia, the Philippines, Singapore, Taiwan and Thailand. This had much to do with the support the show received from major regional and national label associations, including KeyinPrint – the leading Chinese research and publishing group – FINAT, the Label & Tag Manufacturers Association of Australia (LATMA), and the Indonesian Packaging Federation.

A series of well attended seminars took place alongside the show, with high profile speakers including Shen Haixiang, China printing (Group) Corp; Tan Junqiao, Printing & Printing Equipment Industries Association of China; and L&L's Mike Fairley.

This is a market with a great hunger for education, particularly in the more advanced technologies of label production. The conference highlighted the use and performance of UV flexo and combination printing presses,

examined the latest advances in pre-press technology, assessed the changing requirements for smart, smart active and intelligent labeling solutions and looked at digital printing opportunities.

The next Labelexpo Asia will take place between 28 – 30th December 2007. To fill the gap, in December 2006 a Label Summit will take place in Guangzhou, South China along with the Smart Label Summit South China. In addition to a two-stream conference addressing key issues in emerging technologies, there will be a large exhibition, encompassing a 'Label Zone' and a 'Smart Label Zone'.

Flexography in China

Narrow web flexography is a relatively new process in China, which means there is a shortage of operators with in-depth training on modern combination presses. Sheetfed offset and letterpress - with flatbed die cutting – remain the dominant means of converting labels in China today.

This led Gallus to introduce an interesting concept at Labelexpo Asia – a UV flexo village to demonstrate all elements of the UV flexographic workflow.

The companies taking part included: JM Heaford (plate mounting), Rotec GmbH (plates and sleeves), Praxair (anilox



The opening ceremony for Labelexpo Asia. (left to right) Douglas Emslie, group managing director, Tarsus Group plc; Mr Li Shen, Vice Director General, Printing & Reproducing Industry Management, Department of The General Administration of the Press & Publications of PRC; Mr Shen Haixiang – President of China academy of printing technology and China Printing (Group) Corporation; Roger Pellou, managing director Labelexpo

rolls), Zeller and Gmelin (inks), Avery Dennison (pressure-sensitive materials), Rotometrics (rotary tooling), IST Metz (UV curing systems), AVT (web inspection), Esko Graphics (pre-press and pre-production systems) and Leomat (slitter rewinder systems).

Of great interest, and for the first time at a Labelexpo, a platemaking house set up its equipment in the Gallus workflow area. The company is called Sinwa Shanghai (website <http://www.sinwa.com.cn>).

During the show, live UV flexo combination jobs were produced on a Gallus EM 280, using elements from all the suppliers. Also for the first time in Asia, an integrated quality workflow system from AVT was demonstrated, linking the Gallus EM 280 press to the Leomat slitter rewinder via a server link.

Mark Andy was in buoyant mood at the show, where it exhibited its LP3000 narrow web press working with the new VSR3000 rewinder to create a 'lean' manufacturing workflow.

International sales manager, Mike Russell, commented: 'We've enjoyed a good year in China. We are claiming more than 50 per cent of imported flexo machine sales. Against strong local and international competition, this is an excellent result, and a reward for the hard work put in by our distributor, United Printing Equipment & Materials Corporation.'

The LP3000 seen at the Shanghai expo was an eight-color full UV machine running prime pressure sensitive film labels. The VSR3000, a 17", 900 ft/min machine, demonstrated the post production task of inspection and rewinding label rolls.

After the expo, this equipment, along with a Mark Andy Scout press, was installed in a new demonstration facility established jointly by Mark Andy and United Printing. The Training Center for Technical Excellence in Flexo, based at United Printing's new facility in Shanghai, will offer training and instruction in flexography, both hands-on and in the classroom. Mark Andy

and United Printing are working with key groups within the government and commercial arenas to develop a Certificate of Flexo Competence to continue growing the package printing market segment in China. Courses will be open to all interested in label and narrow web printing and production, and will include a foundation level for beginners, as well as more advanced levels for those with existing flexo skills.

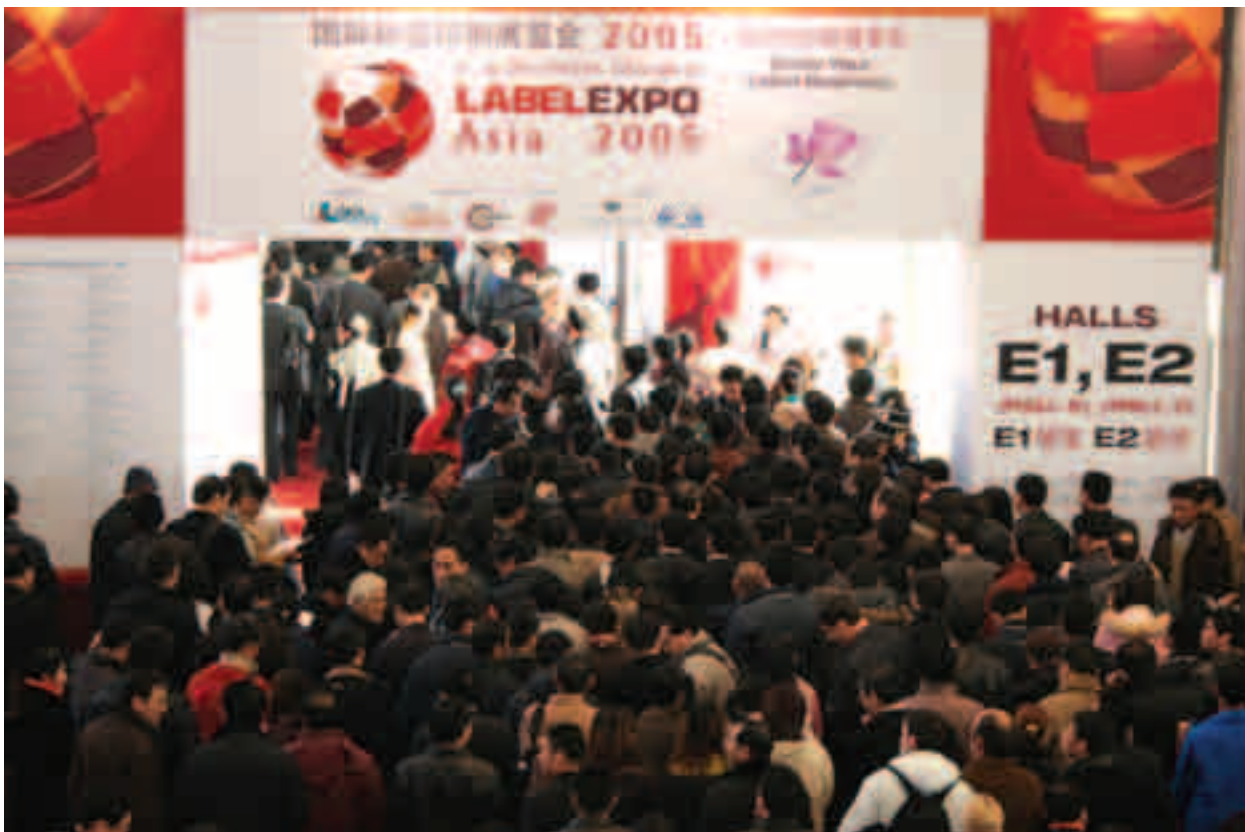
The technical center will also offer print testing, application trials and other technical support to businesses throughout China and Asia.

Nilpeter says it sold 'a handful' of machines at the show but picked up more than 100 leads. The company showed a wide range of equipment, including the FB-3300 flexo press with Drop-In screen unit, and two print units from the MO rotary offset line, along with all the cassette types. It also showed 16in units from the new FA-line. 'There is still a way to go until this show will be as busy as the European or even the US Show,' commented the company's Jakob Landberg. 'The Roll-Label market in China is still very young and we will all have to support and nourish it. The potential is great and we expect a lot from it, so we will continue building up our local organization.'

In an interesting development, Nilpeter announced that Dainippon Screen has been appointed its distributor in Japan.

In terms of new press launches, Focus Machinery showed its new Reflex single color flexo converting press, available with automatic re-register facility. The press was hidden away behind closed doors to try and keep the copycats away.

The Reflex is available in widths of 250mm, 330mm and 430mm and is designed for the production of blank labels, floodcoated labels, laser sheets and all single color flexo products for narrow web applications. The Reflex is supplied as standard with pneumatic unwind, web guide, splice table, die station, sheeting station, slitting, waste rewind and rewind. For



fabric label production, Focus launched a new version of its Letterflex press, alongside the existing L6 (6 + 2 colors) model with in-line ultrasonic cutting.

Omet showed its Flexy press for the first time in Asia-Pacific. The company said there were a lot of printers from Western and the Southern Chinese regions in-particular. 'Many customers coming to Labelexpo Asia are printers using letterpress machines. Now a lot of them are thinking of buying flexographic machines after seeing the performance of the Flexy press.'

Despite the growing interest of flexographic press manufacturers in China, letterpress remains the dominant process. Lintec, which builds its machines in China, was at the show with its LPM300itp press, featuring a computerized inking system which allows inking profiles to be stored and recalled for repeat jobs.

Labelmen showcased its PW-260-RS7C rotary letterpress, featuring the company's in-line screen, double hot-foiling units, new cold foil unit and with the ability to produce in-mold labels in-line. The press was also seen printing with the new generation of metallic letterpress inks.

Working machinery was also demonstrated by Iwasaki, Orthotec and Sanki.

Chinese press manufacturers

Labelexpo Asia gave visitors a chance to assess the current state of Chinese label press technology.

DoWell Swiss International is a new company formed by Chinese company Wutung Holdings and a consortium of Swiss-based engineers. The company exhibited its L 330 flexo label press, which is an interesting example of a 'transitional' technology we are likely to see more of over the next couple of shows. The press started out as a copy of an Arsoma EM410, but

Label printers

Unusually for Labelexpo shows, there were printing companies exhibiting at this Labelexpo Asia. Cordiality Printing, for example, was demonstrating its wide range of labels, including self-adhesive labels, safety approval labels, bar code labels, electronic labels, anti-theft and anti-counterfeit labels and nameplates. In addition, Cordiality Printing produces commercial printing, packaging, blister packaging, electronic membrane switches, and promotional materials.

Shenzhen Emeteq Co., Ltd specializes in providing multi-function and high-quality labels. Brand protection is another important service. The company's clients include end users in the branded-wine, branded-alcohol, branded-medicine, cosmetics and lubricants sectors. It provides a series of complete packaging solutions for clients, including development, design, manufacture and promotion.

is now being fitted with print and converting stations and web handling systems developed within the group. The machine in Shanghai was fitted with one Dowell-Swiss designed UV rotary gravure printing unit, five UV flexo printing units, a single rotary hot foil stamping unit with foil saver – also developed by Dowell Swiss – and a UV rotary screen printing unit. All these units can be exchanged with any other printing station in any position on the press. Personal care and cosmetic labels were produced and applied front and back onto round containers. DoWell are also partners with Harper Anilox Rolls and Bangkok pre-press house Ruam Zub Chareon Co. Ltd.

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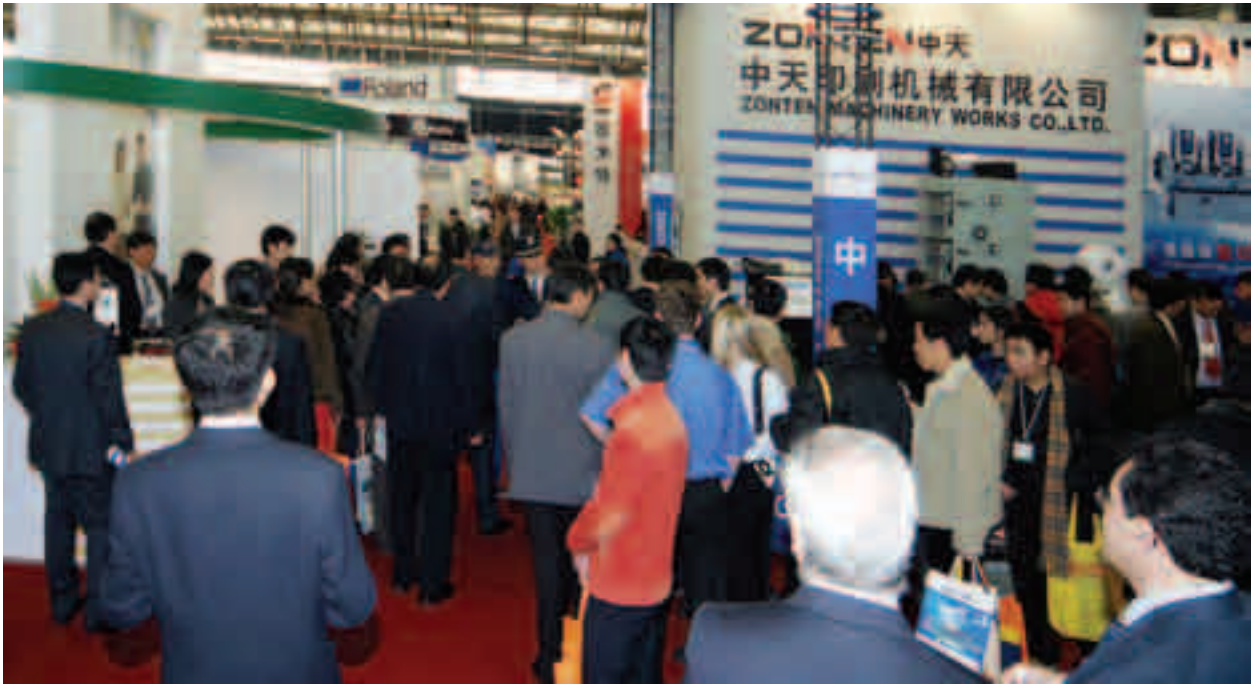


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multi print systems



RFID

There was a lot of interest in RFID from Chinese label printers, reflected in the large numbers attending Mike Fairley's RFID conference sessions. Among companies showing RFID systems was Atlantic Zeiser, with its Tagline system for high volume RFID label quality control and encoding of single items. It is optionally available with ink jet DOD marking, security inks – both IR and UV – camera verification and scanning systems. Mecos showed its Flex Antenna Plating system (Meco FAP), for low cost RFID antenna production, while Raflatac – through its Rafsec division - Avery Dennison and Lintec were all promoting their RFID labels systems.

Weifang Donghang Precision Machinery is a Chinese company which manufactures flexographic presses for converting pressure-sensitive labels, flexible packaging and cartons in a wide range of web widths, and has just employed a European agent. Its KinoFlex presses – closely resembling earlier Aquaflex machines – are of modular construction with up to ten print units, and include electronic web guiding and output tension unit. The presses are available in widths 330mm, 420mm and 640mm. Maximum web speeds are up to 150 meters/minute and drying options include warm air, IR and UV. Despite a solid printing performance, it became clear at the show that the press requires serious upgrading to compete effectively outside China, particularly in the area of tool-less changeover of aniloxes, for example. Indeed, Weifang is now looking for Western press partners to develop a new generation of machinery.

Shanghai Xinmin Taiyo Kikai Co.Ltd showed three presses. The first one, with a 1600mm-diameter central press cylinder, is an eight-color satellite style rotary press. This was its first showing on the Chinese stage. Another 4-color rotary press was custom-made for the medical and food industry, with a compact design. Finally, the TLC-250-6C+1F was shown, a 7-color machine with multiple post-processing functions.

Rotary machines were also shown by H Shine, and by Shanghai Chris Finished Machinery Limited Company, which showed its flexo printing systems.

Platemaking and ancillaries

Combination printing on flexo, letterpress or rotary offset machines is a relatively new requirement in China. Stork was displaying its new RSI Compact lightweight rotary screen unit and demonstrating applications in high value markets like health and beauty products, wines and spirits, and household products.

To maximize productivity on web presses, Martin Automatic was demonstrating the latest version of its STS and STR automatic splicer and rewinds, available for up to 13" webs.

'We are exhibiting at Labelexpo Asia in support of our many OEM relationships,' said David Ho, regional manager for Martin Asia Pacific. The units can also be retrofitted onto existing presses.

To support the growth of UV printing in China, both GEW and IST were at the show. GEW – which is to move its manufacturing operations from the UK to India – was showing the e-Brick modular and compact electronic power supply and its NUVaplus N2 modified atmosphere curing system. IST Metz showed a new lamp module, the MBS-5, which is claimed to bring up to 40 per cent more UV energy onto the substrate surface.

As Chinese printers look to convert higher value label laminates for multi-national clients, some form of web cleaning is highly recommended, and Teknek was showing its new Mini Web Cleaner, designed as a low cost model for web widths from 100 - 345mm, with a maximum speed rating up to 65m/min. Teknek's Pre-Sheeted adhesive rolls were also on show – meaning no knives are required to cut the paper. Vetaphone and Kelva showed a new unit which combines web cleaner, corona treating system and static neutralization.

Imported inks are another critical element in the requirements of multi-national end users – particularly for UV flexo – and there were several suppliers at the exhibition. Xsyst Print Solutions presented both its ink and plates products, with new inks including Flexocure XS free radical UV-flexo ink for



Labelexpo Asia showcased narrow web equipment from a wide range of western suppliers, including Gallus with its EM280 press

shrink sleeves, Lithocure 3G UV-offset ink, and various inks for security and brand protection. Zeller + Gmelin showed three new products for the UV flexo-printing sector, including inks for shrink-sleeve labels, a Radical UV flexo ink series for printing thermal materials, and a mono-pigmented UV flexo color mixing system which optimizes the mixing of special shades.

Label materials

As the requirement for higher quality label converting ramps up in China, so the major Western laminate suppliers are announcing major investment programs. Raflatac announced the construction of a pressure sensitive labelstock production facility in Changshu, adjacent to UPM's existing paper mill in Jiangsu province. The \$40M plant is scheduled to begin producing paper and filmic labelstocks early next year. Raflatac also runs a terminal in Tianjin and a sales office in Beijing.

Avery Dennison announced plans at the exhibition to invest approximately \$100 million to expand its businesses in China over the next five years, including the construction of a new research and development center, and an additional plant to manufacture specialty tape products, as well as several new plants to produce tags and tickets for the retail and apparel industries. At its Kunshan plant Avery recently installed one of the region's most advanced coaters, and this year marks Avery Dennison's 10th year in China.

In addition to the Kunshan site, the company has operations located in Shanghai, Guangzhou, Tianjin, Beijing, Chengdu, Wuhan, Nansha, Fuzhou, Qingdao, Taiwan and Hong Kong.

Ahlstrom, global supplier of release base papers and face-stock label papers, is increasingly committed to the growth of the pressure sensitive (PSA) business in Asia. At Labelexpo Asia, the company unveiled new products, new production capacity projects, and new Asian subsidiaries. The company now has two branches in China – in Shanghai and Guangzhou – and announced a new branch in New Delhi, India.

All the key Western materials suppliers had a presence at the show, including BOPP specialist Innovia Films, Saelim, Sihl, Siliconature Spa, DuPont Tyvek, and the Cham Paper Group

A number of Chinese manufacturers also exhibited, including release liner specialist Wenzhou Xinfeng Group Corp.

Environmental concerns regarding solvents have led in Europe and North America to the development of water-based alternatives to solvent products, and these same forces could soon hit China and Asia Pacific. However, end users need to know that these new products have the same performance as solvents, and several coating suppliers at Labelexpo Asia were showing solventless and emulsion-based adhesive and silicone products.

Cytec Surface Specialties presented its range of waterborne acrylic pressure sensitive adhesives (PSA), Dow Corning showcased its new solventless Syl-Off Advantage Series crosslinker system for high-speed coating operations, and its line of solventless silicone release coatings for use on filmic substrates. A Chinese language guide to these product ranges was also launched. Rhodia Silicones displayed a wide range of release coating products under the name of Silcolease. This product range covers solvent based, water based, non-solvent thermal and non-solvent radiation systems.

Converting and inspection equipment

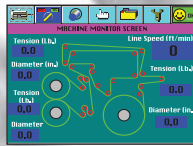
With international end users insisting on the same label print and converting quality in China as in Europe and the US, the suppliers of automated inspection/rewinding equipment are becoming more active in China. At Labelexpo Asia, Rotoflex displayed both its small VSI and larger, more sophisticated VLI inspection/rewinder models. Rotoflex was also demonstrating the die cut performance and versatility of both the DSI and DLI series as well as the Nissa camera based inspection system, claimed ideal for general, cosmetic, and pharmaceutical label production.

AB Graphics International was exhibiting with new Chinese distributor DoWell Swiss, showing an inspection and rotary die cutting unit.

On-press inspection specialists were also at the show. Drello presented its two latest-generation systems, while BST showed its Powerscope 3000 on the stand of China agent Kar Ming Technology Development. The system features quick zoom,



Machine Monitor Screen



Job Screen

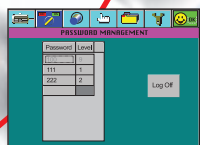
Entry Name	Value
Web Width (ft.)	1.8
Printing Tension (lb.)	1.0
Travel (ft.)	0
Acquit Time (Secs.)	8.0

Alarm Display Screen

Alarm	Status
R/W Upper Core Lock	OK
R/W Lower Core Lock	OK
L/W Core & Sub Roll Change	OK
Safety Cover	OK
Drive Fault	OK
Nip Open	OK
Roll End Fault	OK
Web Break	OK

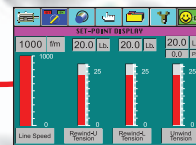
Limits Screen

Max. Tension (lb.)	Max. Speed (ft/min)	Printed Core (ft.)	Unwired Core (ft.)
25	1000	3.0	3.0
Max. Speed (ft/min)	Max. Speed (ft/min)	Travel Start (ft.)	Roll End (ft.)
5	5	6.0	5.0



Password Mgmt Screen

USS Communication Screen



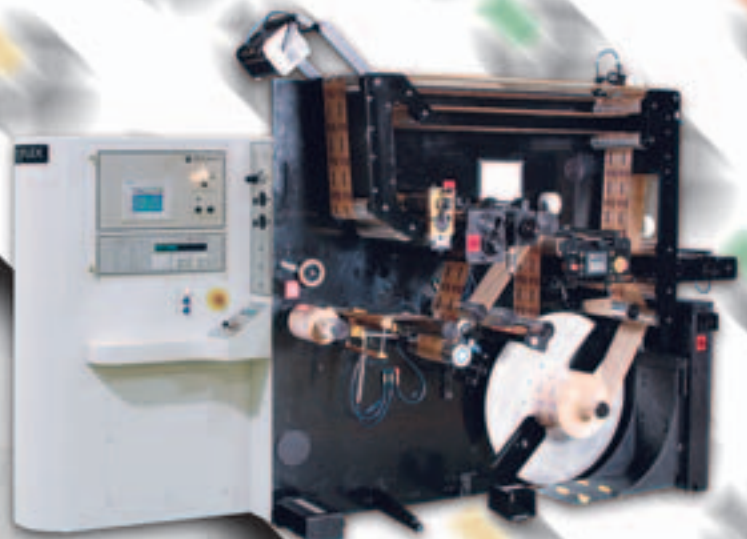
Set-Point Display Screen

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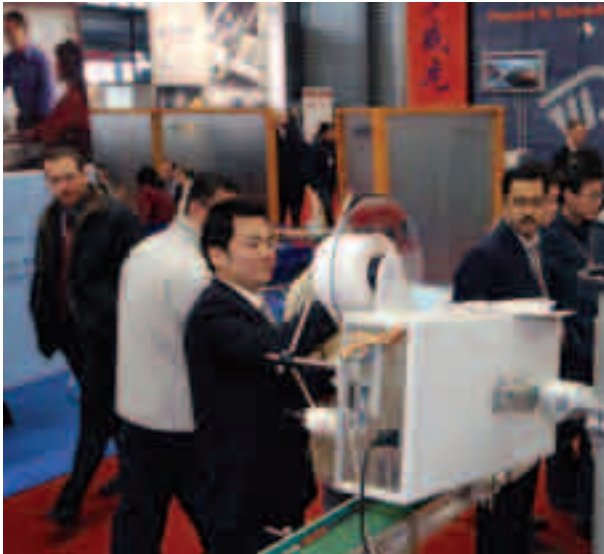
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dynamic image update, auto scan, and split screen. Besides the manual version, Powerscope 3000 can also be in motorized version, which enables the camera positioning and auto scan across the web with a motor. Unilux showed the latest addition to its family of portable strobe lights, the Tracker, and demonstrated black-light inspection systems which ensure that security codes on food and pharmaceutical labels have been properly printed.

Digital printing

Despite the increasing sophistication of the labels industry in China, it is an interesting question whether Chinese label converters are yet ready for digital printing. Both the major suppliers of digital presses – HP Indigo and Xeikon – were present. HP Indigo demonstrated its ws4050 digital press with an ABG Digicon ‘E’ finishing line incorporating coating, laminating, die cutting and foiling. Xeikon Print Solutions showed its Labelsprint digital converting solution, incorporating the Xeikon 330 digital press and the D-Coat finishing line driven by the X-800 front end – which allows the creation of barcodes on the fly and also handles color matching on the 5-color print engine.

Xeikon’s Filip Weymans commented: ‘We saw eager and open minded Chinese people searching for business opportunities across the different technologies, not making any distinction between conventional and digital. We strongly believe that China, being a young market not polluted with over-production, contradictory to western markets, will therefore certainly become a quick adopter of digital technology. Short run will be an important driver but also the high flexibility and variable information printing that digital offers.’

On the inkjet front, Roland DG demonstrated its combined inkjet printing and die-cutting devices, including the VersaCAMM and the SOLJET SC-545EXW printer/cutter with new white ECO-SOL ink.

GRE Digital Solutions Ltd showed a VP2020 digital ink jet printer powered by HP technology on the stand of Chinese distributor DoWell Swiss. DoWell will be building GRE’s digital equipment in China.

Pre-press and plate making

High quality UV flexo is certainly being held back by the shortage of high quality platemaking houses, and suppliers were looking to move the local industry forward.

Stork Prints showed engraving systems for flexo, letterpress and rotary screen-printing, focusing on the new Helios 6010, specially developed for narrow web markets. This is designed to greatly simplify the workflow situation for hybrid (multi-process) label presses.

Esko Graphics was demonstrating its latest range of digital pre-press solutions, including its narrow web flexo computer-to-plate system and packaging pre-production and workflow software.

Accurate plate mounting is critical for top quality flexo printing, and JM Heaford showed its table top video plate mounting machine, the Model 500 ELS, which has become almost a standard piece of equipment for label printers in Europe. The use of print sleeves is becoming more apparent on narrow and mid web in-line presses so Heaford’s latest range of mounters features special cantilever air cylinders to support these sleeves.

Biesse Adesivi, showed its range of double sided compressible flexographic adhesive tapes, including five levels of compressive strength.

Rotary Dies

Everybody involved in selling narrow web rotary label presses in China, whether flexo, letterpress or offset, is agreed that the difficulty in obtaining rotary dies is holding the industry back. ‘The first question we get asked when label printers express interest in a flexo press, is “can we get rotary dies?” says Focus Machinery’s Anthony Cotton. It is a familiar comment.

The problem for rotary tooling manufacturers, is that setting up a flexible magnetic die operation in China is hugely expensive and not yet justified by the relatively small number of rotary presses now being sold.

Recently, Lintec began manufacturing flexible magnetic dies at its press manufacturing operation in Tenjin, but there was no sign at the exhibition that the major international die manufacturers are considering a move into China just yet.

They were, of course, all exhibiting. Kocher & Beck showed for the first time in China its new generation Gapmaster Plus, with a special anvil cylinder enabling the label printer to adjust the air gap between the anvil and magnetic cylinder to compensate for any variation in thickness of the backing material. The system also extends the life of rotary dies by allowing the printer to compensate for wear. K&B was also showing magnetic printing cylinders for letterpress printers.

Xynatech concentrated on converting of folding cartons with flexible dies. Flip top cigarette cartons, gable top milk cartons as well as other tobacco and food cartons are already being cut and creased on Xynatech PC dies.

RotoMetrics showcased its full range of adjustable clearance anvils, dies and cylinders, including enhancements to the UniFlex system. Gerhardt also had a stand at the show, while Electro Optic was showing its Dura LINE Special-C (DLS-C) for cutting difficult label materials. ■



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Kraft joins RFID debate

With RFID and the electronic product code set to transform the global logistics industry, **Andy Thomas** asks Kraft Foods' **Peter Jordan** – what are the obstacles and opportunities for all stages of the consumer goods value chain?

Few people understand the potential of RFID technology to revolutionize global logistics chains and improve efficiency as well as Peter Jordan. Jordan is Director International B2B Strategy at Kraft Foods and co-chairman of the Global Commerce Initiative (GCI) steering group, which represents the key players in the global consumer product goods chain. His strategic role is making the GS1 System and EPC (Electronic Product Code) standards work for Kraft and other global players in the global retail and consumer goods industry, and making use of emerging technologies like RFID where they promote this goal.

Jordan is well qualified for the task. He held senior positions on GS1 (formerly EAN International), and was a founding member of the GCI.

Making 'global' standards work has never been straightforward. Product identification and Symbology standards were first developed in the late 1970's with the intention of making product numbers and barcodes an international system. This was then followed by the development of standards for information exchange, EDI. But it took time for the global standards to replace some well entrenched local standards. 'For EPC to be effective, it must end up as universal as the barcode, so it will work globally. This could take another ten years,' remarks Peter Jordan.

The Global Commerce Initiative is today the key forum for promoting consistent standards for retailers and manufacturers worldwide. 'Multi-national CPG companies like Kraft have an important role to play in helping in the research, development and implementation of standards because we are working with

international suppliers and retailers every day,' says Peter Jordan.

'The end game is that we want the ability to uniquely identify items anywhere in the supply chain, up to the point of sale, and to exchange information about these items in an internationally standard way so we can automate our stock handling processes. When we will know what a product is, where it is in the supply and distribution chain, and what state it is in at the retailer, we can then work out replenishment planning, tailor our production planning and focus in on areas that need to be looked at. If we can quickly and easily work out what is not working in the logistics chain, then we can respond.'

Jordan believes that the Global Commerce Initiative has already encouraged international CPG companies to work smarter – particularly by improving relations with retail customers and third party carriers.

But labels suppliers have so far been left out of the GCI's initiatives. There is an 'Upstream' packaging suppliers group, headed by Crown Cork, which is looking at a standard method of defining order and stock reports which Management Information System (MIS) suppliers can implement in their software.

'In the past, we have done some work to share information with our packaging suppliers, but not in a big way, and we must be better here. We need to have conversations with our packaging suppliers around various issues, such as production plans and forecasting, stock levels and vendor-managed inventory.'

RFID

So where does Peter Jordan see RFID fitting into the CGI's global supply chain vision? Cautious optimism perhaps best describes his outlook: 'We recognize the potential of RFID and what it can bring, but cost effectiveness, performance, technology reliability, consumer privacy and standards remain issues. These must come together and be addressed to make the technology pervasive.'

Kraft has been involved with the pallet-level RFID pilot initiatives of Wal*Mart, Metro and others.

'We have to take pallets to our warehouse, de-palletize, and apply the tag, re-palletize, and then ship to the retailer. We are currently finding in this pilot that tagging all our cases at source is not cost-effective.'

Moving to case-level tagging presents a new range of issues: 'Are we going to label or embed a chip in our packaging from the corrugated supplier? If it's a label, do we encode the label before we get them, or get a 'blank' label and encode them at the point of production? Are there issues around having silicon near a food packing line? Then what if you are supplied with a reel with gaps where labels with faulty chips have been removed? That means we miss labeling a case.' These are the kind of issues that some manufacturers are dealing with today and developing working practices to deal with them. 'Doing this in a working environment is the only way to learn.'

But Jordan can see the potential benefits of case-level RFID tagging:

'At the case level, being able to track products through the distribution channel should increase on-shelf availability. RFID should be able to tell you that you have 'x' product in the storeroom and x-amount on the shelf, then the barcode tells you, via the scanning terminal, what individual products you are selling. For product promotions we can make sure all stores have stocks in the back room three days before the promotion goes live.'

Correct use of the data is critical. 'We don't want to just collect data for its own sake. That was very much the mentality of the last decade. We need to know when things are going wrong – for example when something has not been moved from the stockroom to the shop floor on the day of a promotion – so we can intervene.'

Working more closely on logistics with labels and packaging suppliers, allied to this powerful new inventory management tool, will allow CGP companies to match consumer trends much more effectively by reducing cycle time from marketing concept to shelf promotion.

Item-level RFID tagging is a different matter. Peter Jordan does not anticipate item level RFID tagging, in the high volume,



Peter Jordan, Director International B2B Strategy at Kraft Foods and co-chairman of the Global Commerce Initiative (GCI) steering group

low cost categories for at least 7-10 years unless there is a 'major breakthrough' on cost and performance.

'Today I cannot comprehend how we would encode and encrypt on fast packaging lines. Also, there are unresolved issues of compatibility between tags and readers from different manufacturers. Metals and viscous fluids are another issue, and we need to do more work on the antennae to get better read-write results when the orientation of the containers is changed.'

Global standards are becoming less of an issue. 'It is still not a global system, with fully compatible tags and readers. Frequency issues are becoming less but there is still work to do.'

Even if the cost of RFID labels comes down below the five cents quoted by many commentators as the 'breakthrough' cost for item-level tagging, Jordan cannot see it happening for commodity food items due to overall volume of product and cost:

'Item level RFID will be category driven, with products that are either high value or have relatively high shrinkage rates. With apparel, there is a clear benefit for knowing where something is in a particular size, style or color.'

Peter Jordan points out that in today's social climate, CPG companies must also consider the environmental and consumer privacy implications of item level tagging. 'If you have tags on a couple of billion consumer units being shifted around the world this could be a lot of waste silicon.' At the same time, we must be conscious about protecting consumer privacy, and look at ways to address consumer concerns on this issue, such as informing them if a tag has been put on an individual item.

So what is Jordan's advice to label converters contemplating a move into RFID for item-level applications? 'My advice is to monitor the situation, think "out of the box", test innovative solutions and be ready for when the tipping point makes this a pervasive technology. If you aren't, your competitors will be.' ■

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New age technology for New World wines

Wine exports from Chile have grown by over 25 per cent in the last three years and label converters are investing in digital print to support this world-class industry. **Katy Wight** reports

Chilean exports rose 35 per cent in 2005 to a total of \$39billion – representing 65 per cent of the country's gross domestic product. The country is known as Latin America's free trade pioneer and exports of wine, copper, fish, fruit, cooking oils and forestry products have helped per capita income grow fourfold over the past twenty years. With Chilean products appearing on shelves in all continents, label printers have had to raise standards to compete on a global level – particularly in the quality-driven wine industry. Chile's wine label market has many players with offset and flexo capabilities, but digital printing is making a distinct inroad.

Digital label printing is perfectly suited to the Chilean wine industry and HP Indigo has established a niche group of

converters who are exploiting the potential. Estimates put the number of wineries in Chile anywhere between 300 and 400 – many of which are small 'boutique' vineyards. Each winery is likely to grow a number of grape varieties and export these to a number of different countries, requiring labels with different languages, importer names and legal requirements. As label variations increase, run lengths and lead times are simultaneously decreasing as wine exporters move to a JIT supply chain, and have tighter schedules to meet shipping deadlines.

L&L visited five label printers in Chile's capital, Santiago, that are using HP Indigo technology to service the wine market.

Multigrafica

Starting out as a commercial printer with one offset press in 1983, Multigrafica now devotes itself entirely to labels. Burgeoning vineyards and wine exports from Chile led the company to focus specifically on wine labels and today it represents a good 70 per cent of the business. The remaining 30 per cent of Multigrafica's work lies in the food industry, particularly in canned goods. With three sheetfed offset presses (a 5-color Komori, 4-color Ryobi and a 2-color Ryobi), the company has extensive experience of wet glue labels, but recently looked to PS labels following trends in the wine industry.

'We began to print self-adhesive labels at the beginning of 2005 with an HP Indigo ws4000 press,' explains general manager and founder Juan Luis Moreno. 'We had no experience of self-adhesive roll labels, so we thought that it would be easier to start with digital printing and it would also enable us to offer new products to our clients. We have also bought an 8-color flexo Nilpeter FA 3300 with inline hotfoil and embossing which is due to arrive at the beginning of this year. We are sure that we need both technologies as right now we can only compete on the short runs with digital – it was just a case of working out which technology to invest in first. With both systems we will be able to compete on the whole spectrum.'

'It's a big change moving to flexo, but self-adhesive is showing good rates of growth in Chile. About 33 per cent of wine labels are PS and growth has been stable for the past three or four years.'

Over the past five years Multigrafica has grown fourfold – partly due to the implementation of a strategy to employ the latest technology and continuously update it. The company has invested in Creo prepress, Cartes finishing equipment and a JDF-compliant Komori press with auto plate set-up and cleaning – as well as the digital press – and has focused all of its attention to exported goods.

'Our main customers are exporter companies and you need to provide a world-class label for products that will appear on shelves in Europe and the US,' says Moreno. 'We need to be able to give our customers quality that rivals the best printers in the world, to help them to be successful. We want to use technology to develop our business and cater to the needs of our clients so that we can become the leader in service.'

With average run lengths between 1,000-5,000 labels (10,000 labels is considered a long run on Multigrafica's ws4000), digital capability is an essential service, especially with customers demanding shorter lead times and higher quality at a lower cost.

'Our customers love the improved service that digital offers,' says Moreno, 'and the digital market has space to fill in the wine industry. There are many small wineries in Chile that require short runs and even at the bigger wineries, each country that they export to has its own requirements for a wine label, such as different languages, alcohol content warnings and import numbers – and some very special wines, such as limited editions, are even sequentially numbered.'

Moreno explains that the company has been through a learning curve with digital printing and still faces some challenges. The wine travels long distances and needs to be strong to resist packing and shipping, and Multigrafica still has 'scuff' issues with certain types of paper. Moreno also says that the cost of digital consumables limits competitiveness, but that growth prospects are good.

'Our digital business is growing as Chilean exports increase,'

he says, 'but the market needs to understand more about digital print and self-adhesive labels. We will continue to position ourselves as a provider of specialty products to help these exporter companies grow.'

Quintero

The pioneer of Indigo technology in Chile, Osvaldo Quintero, invested in his first digital press five years ago and is aiming to be an entirely digital label printer within two years. Quintero started the business 15 years ago following his experience working for a commercial printer in Santiago. Growth in the commercial sector was flat, but Quintero could see that the label market in Chile was growing fast – along with wine exports – so he sold his car and bought his first offset label press.

Today, Quintero has 40 employees working two shifts, seven 2-color offset presses, three coaters, six machines for sheetfed hotstamping, one roll fed Newfoil hot stamp and die cut unit – and two Indigo digital presses.

'I was the first printer to install Indigo technology in Chile and I was very nervous,' explains Quintero. 'In 1999, Imagex (HP Indigo's agent and distributor in Chile) demonstrated the Indigo technology and I immediately saw a great market for this in wine. The turnaround is faster, it gives greater color possibilities and the long run is disappearing. Everybody is moving to short runs and the JIT concept is very important for label buyers in the wine industry.'

Quintero's initial purchase was an Indigo Omnius Webstream, which now works for 12 hours a day alongside a 3050, that went into production in October 2005. There's a twist on the 3050 press – it's sheetfed and was specially made for Quintero to work with their existing sheetfed finishing equipment. Embossing and hot stamping capabilities are key for wine labels.

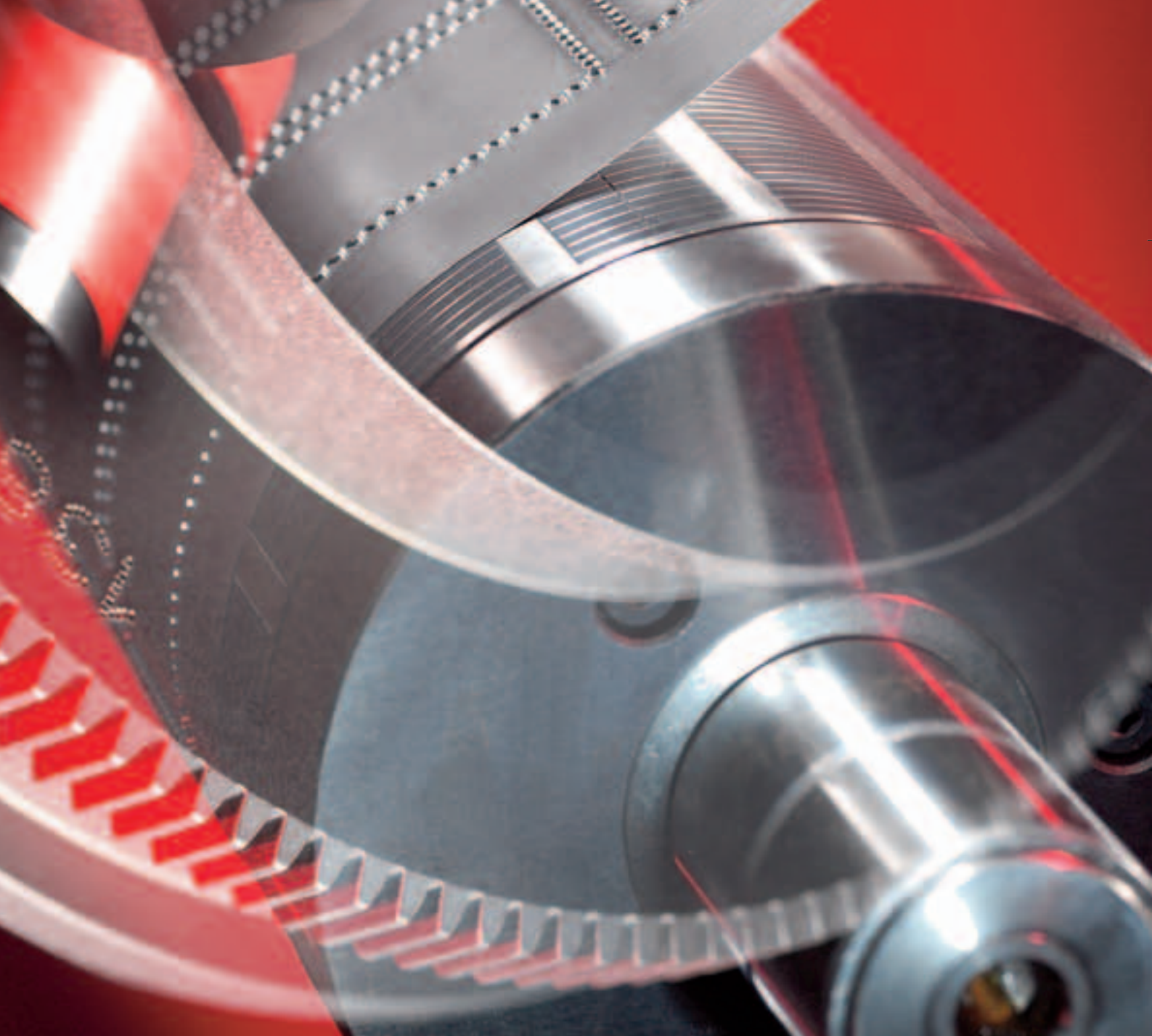
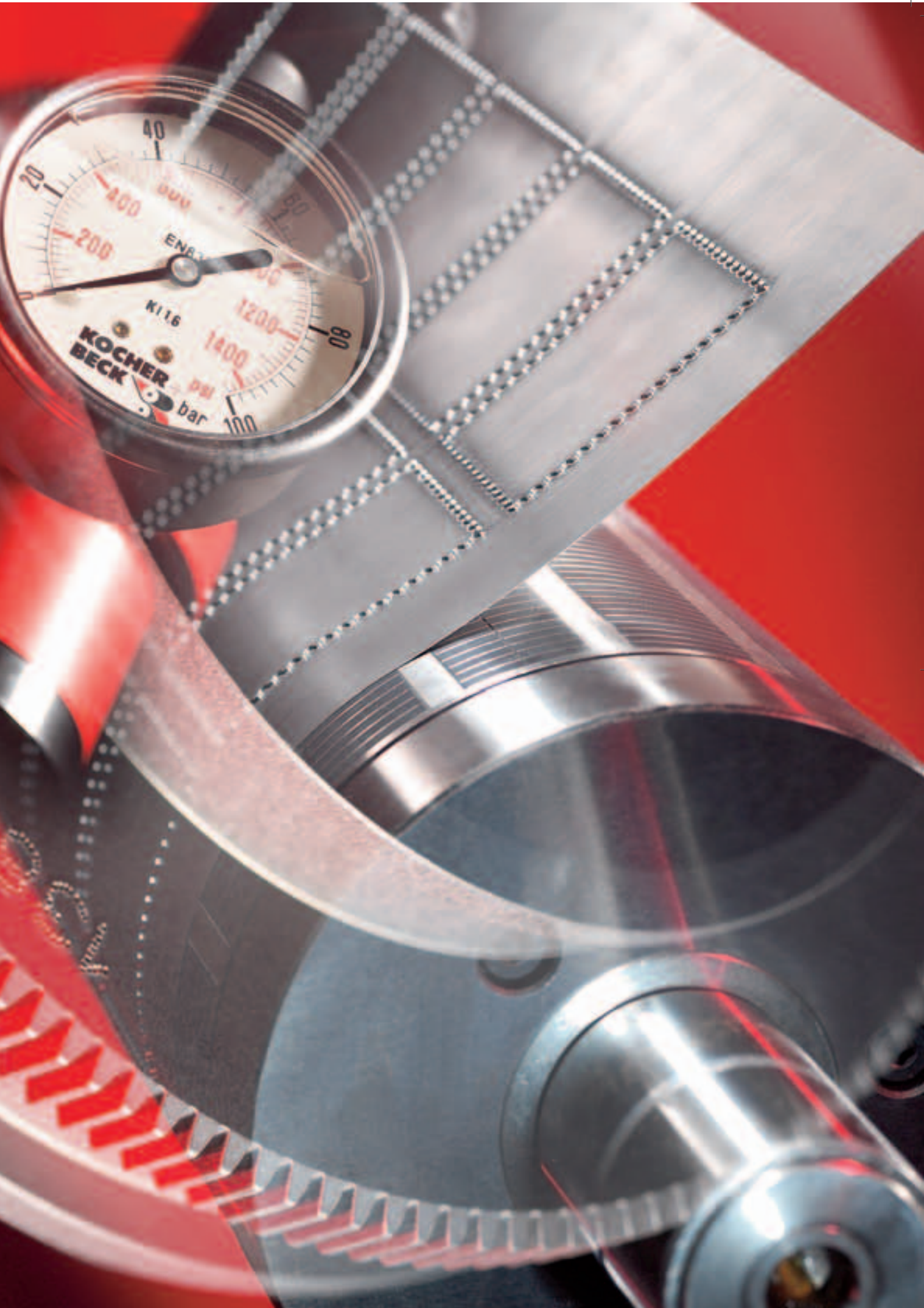
'The 3050 produces much better quality, in terms of the color and resolution, and it's also twice as fast,' says HP Indigo operator Juan Perez. 'Speed to delivery is very important and digital gives you a competitive advantage. Our average print run is between 10-20,000 labels and we print the smaller runs on the Omnius.'

Quintero adds: 'There is a greater market right now in Chile for glue-applied labels and the challenge lies in getting a faster transition to digital. We are focusing on teaching our customers about the quality of digital offset. We were the first in the digital arena, when there wasn't any competition, but now it is a different story.'

Quintero is working hard to increase the number of vineyards and wine brokers that it works with, but the future is bright. The company just moved into a shiny, new facility and has created more capacity and room for growth with the new 3050.

Huberto Scott H and Sons

Huberto Scott began importing products for the printing industry in 1976. Part of his product line included hot stamping machines, and realizing the potential of self-adhesive labels, Scott began printing them with a hot stamp. The business began to grow steadily and Scott invested in its first letterpress machine, made by Etirama of Brazil, in 1985. Two years later he imported an Iwasaki letterpress from Japan. Today H. Scott has nine Iwasaki letterpress and three flexo presses, as well as silk screen, hot stamping, embossing and doming capabilities, and the company caters primarily to the domestic food, pharmaceutical, cosmetic



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and electrical appliance markets.

'We bought our first Mark Andy flexo press around 1994 because of the color capabilities and also the ability to varnish inline,' says Huberto's son Harry Scott, 'and this is when we moved into mass production, because we were able to produce much larger volumes than with the letterpress. We recently bought a Nilpeter FA3300 to cater to mass-market prime labels and in 2003 we imported the HP Indigo ws2000 for our short runs. The Chilean market is small and there are many small companies requiring short runs, but we also liked the quality of the image. The HP Indigo means that we have our hand in the short run market and with the Nilpeter, we will have both ends of the market.'

H. Scott as a whole is expecting growth of 20 per cent this year and the digital division is experiencing growth of about 5-6 per cent. However, Harry explains that they have reached full capacity with the ws2000.

'There has been a real learning curve with the HP Indigo, because none of our operators knew about digital technology. We sent four of our staff to HP indigo in the Netherlands and we also had technical advice in-house, but it took about six months for us to have a good grip on the technology. However, digital has allowed us to enter new markets and it took us to a higher quality. In particular, it is enabling us to get into the wine market, which is a new area for us. It's possible that our future investment will include more digital capability and we could upgrade to a next generation machine. Digital is the future, it just needs to get faster for more efficient production.'

H. Scott has grown fast over the last five to ten years and has invested greatly in its print capacity and capabilities. Today it's placed in the top five label converters in Chile and it's focused on staying there.

'Our success is based on our high quality printing,' says Harry, 'but we face a challenge in trying to remain competitive. Prices



(left-right) Huberto Scott and his son Harry Scott with their HP Indigo WS2000

are going down and we must reduce costs and be more productive, so we are trying to introduce technology that will allow us to optimize our printing and streamline our operations.'

Chile's domestic label printing industry also faces other challenges from outside. The country has a very low level of protectionism to encourage investment, but this means that foreign label printers are free to establish plants in Chile and fight for a share of the market.

Harry mentions two North American printers who have come strong into the wine market with firm financial backing, hi-tech equipment and technical expertise. These companies represent a particular threat.

The restructuring of the Latin American market by multinationals has also affected Chile's domestic manufacturing.

'The multi-nationals have all restructured, so that in many cases, they are sourcing for the entire region from one plant. For example, instead of localized manufacturing in each Latin American country, Colgate moved to Argentina and now exports all its product all over South America, and that has hurt our production.'

AMF

AMF is one of the most established printers in Chile. In operation for over 60 years and with annual sales of \$34million, it is a force to be reckoned with in the local market. With a legacy in continuous forms and commercial print, the company recently diversified into labels with an acquisition, and its already making an impact.

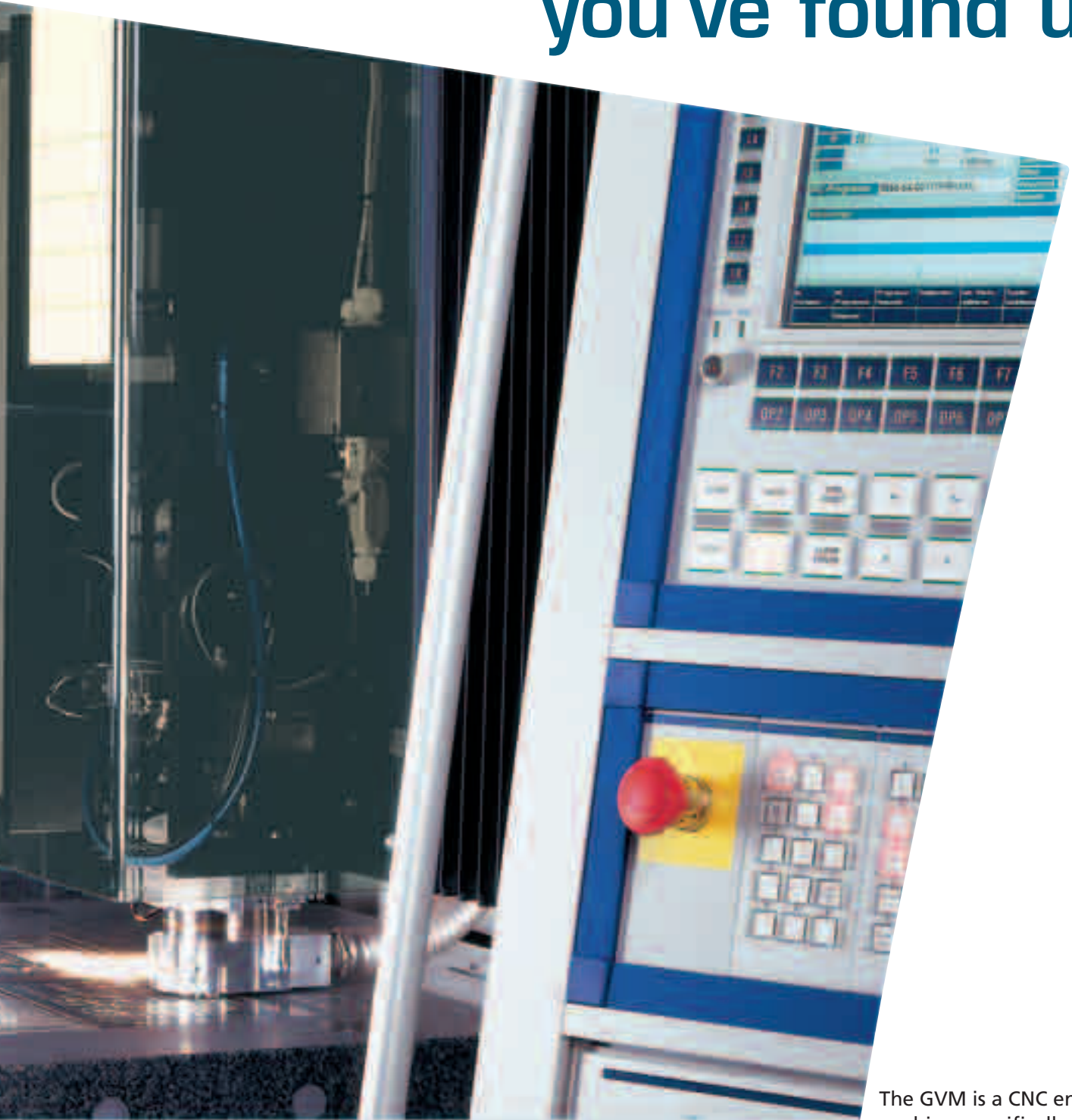
'When the company started, it was focused on business forms, but there are many threats to this market,' says commercial director Marcelo Rettig. 'We defined a new business focus, to offer the market an integrated print service and a few years ago, we introduced the area of commercial print. Then we decided to focus on the wine label segment because we didn't think that the market was well attended.'

At the beginning of 2005, AMF purchased the assets of sheetfed offset label printer Monaco. Once this department was up and running, AMF began looking to pressure-sensitive labels.

'We have just started in the label scenario,' says general manager Felipe Villaseñor. 'We need to find out what the needs of the market are. We started in sheetfed offset labels, but we wanted to get into self-adhesive labels. Investing in the HP Indigo ws2000 allowed us to start in self-adhesive step-by-step.'

AMF found the curve of demand for digital labels very sharp and after only three months, the company found the digital press at 65 per cent capacity. Villaseñor adds: 'We are focusing on the Chilean wine market because exports are growing and the market is worth \$1.1 billion. The market is very fragmented and print runs are also very fragmented, so we get lots of small orders and our time to delivery needs to be fast. We need to deliver within three or four days to make sure that the wineries can meet their shipping deadlines – and they're very tight. Our average run length is 2,000 labels.'

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Digital is growing and not just in the wine segment. There is a real shift towards short runs and variable data for other industries such as direct mail, Villaseñor explains. 'Our company prints huge amounts of variable data for commercial customers such as bank statements and marketing for department stores. There is a specific segment of the market that can benefit from this opportunity – and this kind of fast communication with the customer isn't possible with flexo.'

The company plans to expand more into the PS market, but is still reviewing the technology options for long runs, explains operations manager Cristobal Molina. 'The self-adhesive segment is key and market sources put growth in Chile at around 20 per cent,' he says. 'Digital technology is a tool to catch and attend to the short run market and we are looking for another technology to catch the long runs – whether that will be offset or flexo is the decision that we need to make. We could increase our digital business if the cost of inks and consumables was cheaper. The prices have to come down.'

'Our customers are very happy with the quality and time that it takes to deliver. They know the AMF names because we are the leader in other printed products - and now we are in the wine business, they can see that the product is good and our reputation is high. We aim to be number one – but step-by-step.'

Colorama

Francisco Langlois started Colorama in 1988 with a single offset press. Today, the company employs 90 people and has a turnover of \$6 million – and is still growing fast. Colorama began in the commercial print market, but expanded on its sheetfed offset capabilities with flexo to get into the self-adhesive market. The company has five sheetfed Heidelberg presses between two and five colors, two Mark Andy Comco presses, an Etirama flexo press, a Nilpeter 2250 – which it bought at the beginning of 2005 – and an HP Indigo ws2000.

'We started up very fast with digital because we already had experience of self-adhesive,' explains Langlois. 'Forty per cent of the work that we complete for the wine industry is printed on the HP Indigo and the rest is done on our flexo presses. Ninety per cent of these labels involve embossing, foil or both (Colorama has two Newfoil 350s as well as inline capabilities). We only ever repeat about five per cent of our digital jobs, because the wineries are always changing things like the import

numbers. With nearly 600 orders per month, it makes the admin for short runs quite difficult and expensive.

'We are very intensive users and the digital press works for ten hours a day, generating around \$45,000 per month', he explains. 'I have seen the HP Indigo working in Europe, generating around \$500,000 per year – and we have much lower prices here than in Europe. We print digital labels for about 20 different wineries and the average run length is 3,000 labels. We have stable amounts of growth in the digital wine industry and we are expecting it to be between 3-4 per cent next year, but there has been an explosion in competition in the past ten years.'

Colorama exports to Argentina, Bolivia, Venezuela and Cuba and has established an office in Buenos Aires to exploit the Argentinean wine industry, which is lagging behind Chile. Langlois is also considering establishing manufacturing operations in the country as the Mendoza wine district is only six hours by truck from Santiago. Transportation is easy and it would eliminate duties. Colorama is also looking to different market segments to grow revenues.

'We are approaching other markets, like the food market,' adds Langlois. 'December to March is harvest time in Chile and fruit is in vast quantities, so there is potential growth from flexo. We are focusing on clients that export – the olive oil, wine, fish, food and forestry markets are all growing very fast in Chile.'

As well as investigating new markets, Colorama has also been looking at diversifying into new applications. The company recently began running shrink sleeve labels on the ws2000 for a canned condensed milk. The company had some apprehensions before starting the project because the blanket roll on an HP Indigo is very hot, but they used a specially adapted film that only shrinks beyond 130°C. The shrink sleeve market generates millions of meters a year in Chile and it's usually printed wide web flexo, but converters and end users have big problems for short runs.

Colorama is always looking for new opportunities to enable the company to continue on its trajectory of growth. 'The market in Chile is very small,' says Langlois, 'but we are in three printing processes and we can provide every possible solution to a client.' ■



(left) Osvaldo Quintero aims to be an entirely digital label printer within two years



Cutting edge

As sales of digital label presses accelerate, the growth of laser die cutting seems a natural progression. Spartanics of Illinois sees the potential and recently began manufacturing the cutting technology.

Katy Wight reports

At an open house at its Rolling Meadows, Illinois, headquarters, Spartanics recently launched its new laser die cut product line. Spartanics has taken over as the new manufacturer of Klemm Laser Cut systems and will also provide global sales and support. The new Spartanics Klemm Laser Cut System represents a technology transfer between Klemm's German-based engineering expertise and Spartanics' capabilities in machine controls, software and optics engineering. Laser die cutting enables label converters – and many other types of manufacturer – to change the shape of a die cut from one piece to the next, without changing any tooling, which offers significant cost and time savings.

'We examined a wide range of laser cutting systems that were available in the market and the engineering of the Klemm made it stand out immediately,' says Bill Knotts, VP sales and marketing, Spartanics. 'German engineering has quite a reputation for attention to detail and optimal functionality, and the Klemm certainly lived up to that reputation. The Klemm system stood out because of its good control of the laser beam pulsing needed to cut sharp angles or corners.'

Corners, sharp angles and the start/stop point of a laser die cut have traditionally been problematic as the laser cannot slow down or cover the same spot twice without the risk of burning.

'There is no other laser cutting technology that offers the same degree of control over the laser beam, so that label printers can kiss cut the sharp angles on labels without burning holes in the release paper,' adds Knotts. 'Klemm has developed proprietary software that sets a new standard for how to synchronize the laser beam with the cutting details for the artwork. Compared to other systems, this software is extremely easy to use.'

"There is no other laser cutting technology that offers the same degree of control over the laser beam, so that label printers can kiss cut the sharp angles on labels without burning holes in the release paper"

The modular Spartanics Klemm System demonstrated at the open house uses a 200W CO₂ laser and the beam is directed by two mirrors. Spartanics offers a range of systems with laser power up to 1,000W. The demo machine reviewed at the open house had a 200mm field and the web was fed at between 10-40m/min. Feed rates are dependent on the intricacy of the shape, and the more intricate a shape, the more it will slow down the web. Spartanics claims that the system will maintain consistent registration accuracy within 0.1mm and that set-up can take an experienced operator just 45 seconds.

'You need to work out the parameters for each job, but it's very easy to find the right values,' says Paul Dirienzo, Engineering, Spartanics. 'Within four or five shots you can find the correct values for a particular substrate and adjustments are very quick. With a month of experience, a label converter could set it up in seconds.'

Integration with existing digital label presses and prepress systems is very straightforward and manufacturers such as HP



Spartanics has taken over as the new manufacturer of Klemm Laser Cut systems

Indigo and Xeikon are seeing increased customer interest in laser die cut technology.

'Laser die cutting is the key to becoming truly digital, from printing, right through to finishing,' says Mark Rogers, sales manager, label and finishing equipment Punch Graphix Americas (Xeikon), 'but right now the cost of this capital equipment investment is very high, when you compare it to traditional tooling costs. Laser die cutting is now in the realm of possibility for certain applications such as circuit boards and gaskets and the technology lends itself to label printing, but it won't be fully adopted until the price comes down and the printers find that certain market niche. I can see it coming – and it will get there – but it will just take some time.'

Ray Dickinson, category manager, industrial printing, HP Indigo, expands upon the issue of cost: 'No one element is too expensive, but put all of the elements required for digital printing and finishing together, and we are looking at a \$1 million investment. Most of the companies in the industry are sales of less than \$5million, so there are only a few companies that can afford the investment.'

'The conventional die manufacturers have done such a good job of taking the cost and lead time out of the system, that they have really pre-empted lasers. However, the market feedback that we have indicates that the Klemm is a great

“The conventional die manufacturers have done such a good job of taking the cost and lead time out of the system, that they have really pre-empted lasers”

system and Spartanics has always been a reliable partner. It is a really neat laser die cutter, with a quick set-up time, excellent register and it doesn't take up too much space.'

Bill Knotts, VP sales and marketing, Spartanics certainly has faith that, for the right applications, the Spartanics Klemm System will make an impact in the US, concluding: 'Because the Spartanics Klemm System delivers consistent and reliable quality, label printers can truly reap the advantages of digital die cutting technology and secure a niche in short run work.' ■



Ko-Pack STEALTH 650 16-color both sides flexo printing press

Pepsico embraces Ko-Pack sleeves

Website <http://www.ko-pack.com/>

Ko-Pack International is claiming a breakthrough after developing six 'environmentally-friendly' shrink-sleeves and labels, printed both sides in full colour for PET bottle applications.

According to a survey conducted in May 2005, the annual Japanese sales of PET bottled water has reached 16,685M bottles, a figure set to increase in the years to come.

In order to cope with this growth in demand for PET bottles, Government standards require that consumers must be made aware of the need for recycling - a need which requires the film label to be separated from the bottle. Up to now, this has not been easily achieved. The difficulty lies in who should be responsible for making this separation possible: the consumer, the bottler or the label converter. This has remained a major barrier to achieving domestic recycling targets.

This problem has been specifically addressed by Ko-Pack's Yamagata label converting operation, which has combined flexo press developments with their expertise in printing inks and filmic substrates to produce a range of innovative promotional both-sides printed products, specifically for users of PET bottles.

"It is not currently possible for gravure presses to encompass in-line converting functions such as slitting, Sleeve forming and perforating"

The solutions are now being used by leading international soft-drinks manufacturers.

Gravure printing has traditionally been the dominant method commercially available for printing shrink-sleeves, a print process not suited to both sides printing of shrink-sleeve films. Additionally, it is not currently possible for gravure presses to encompass in-line converting functions such as slitting, sleeve forming and perforating - all achievable with Ko-Pack's CI D flexo presses.

Each of the six products include an incentive for the consumer to remove the sleeve label from the bottle. Details of special promotions collectable stickers and games are printed on the reverse side to encourage the consumer to separate label from bottle. Additionally from the point of view of the drinks manufacturer/bottler, twice the amount of space is available for product and market promotions, encompassing special offers, games utilising 'scratch-off' patches and unique variable data.

One of the first imitational companies to use the Ko-Sleeve products is Pepsico, following assessment by the company's New York headquarters. Since February 2005, Ko-Pack has delivered both-sides printed 'window' labels to Pepsico locations in Poland Spain, Mexico, Turkey, America, Russia and Italy. These labels carry special campaign designs based on the sales promotional objectives of each country.

Explaining the thinking behind the concept, Jun Kobayashi, chairman of Ko-Pack International, said: 'It all began several years ago, when I questioned the reason for only printing on one side of PET bottle labels. I realized that by changing to both-sides printing there would be very significant benefits. Drinks manufacturers would immediately double the space available for product information and national/International promotions,



without incurring additional film costs and consumers would be presented with an incentive to remove the labels and so directly contribute to achieving recycling targets.'

The various types of product in the Ko-Sleeve range can all be printed in up to 6-colours on either side, plus additional features:

- The wrap-around 'window' label is multi-layered with the reverse side incorporating removable stickers
- 'scratch-off' games can be produced on the reverse of wrap-around labels and shrink-sleeves
- lottery games featuring unique variable data can also be shown on the reverse of labels and sleeves
- novelty lens label which utilizes the magnifying concept of viewing an image through water
- chameleon label again utilises the effect of colours of the bottle contents on the label or sleeve design

Jun Kobayashi continued, 'Pepsico have chosen the 'window' label for national product promotions featuring collectable stickers of famous sports people, as well as seasonal Christmas stickers.' Pepsico has approximately 250 bottlers in over 100 countries. Almost 150 of these are directly accountable to Pepsico and it is expected that nearly all will adopt the 'window' label in future marketing campaigns.

'It is very rare that labels are exported to overseas markets from Japan,' continued Jun Kobayashi. 'I take great personal pride in Ko-pack's capability of being able to supply them to Pepsico bottlers worldwide. The soft-drinks market is very competitive and manufacturers will always continue to look for new and inventive ways to encourage and maintain customers. Double-side flexo printing provides an opportunity to do this and as such will rapidly move into those areas previously served by single-side gravure printing.'

With gravure currently under pressure in Japan from legislation on solvent emissions, flexo is also seen as a more environmentally friendly process.

Ko-Pack has received in 2005 two prizes 'WORLDSTAR' and 'Good Packaging' for the PET bottle Label. 'WORLDSTAR' is the award for packaging excellence, which was awarded by the World Packaging Organization. 'Good Packaging' is an award for a beverage packaging category awarded by the Japan Packaging Institute. ■

"It is very rare that labels are exported to overseas markets from Japan. I take great personal pride in Ko-Pack's capability of being able to supply them to Pepsico bottlers worldwide"



International Patent Pending PCT/GB 2004/001892



Ipex preview

With label and packaging interests in mind, **Barry Hunt** helps mark the card for prospective visitors to this year's largest print show

Billed as the global technology event for print, publishing and media, Ipex 2006 takes place April 4-11 at the National Exhibition Center in Birmingham, UK. Around 60,000 worldwide visitors are expected during its eight-day run and nearly 1,000 companies from 40 countries (60 per cent are from outside the UK) will exhibit. New facilities include a dedicated flexible packaging area. The configuration of the exhibition halls is said to reflect a production workflow from image creation through to delivery. New product trails will help visitors locate a particular product or application using a series of hand-held guides for on-site reference. Individual trails will also be published on-line at www.ipex.org. International days will be held to offer support to overseas visitors. For example, 'North America' day is Monday, 10 April and 'Europe' day is 11 April. There are also sector-specific days to give visitors a dedicated focus on key sectors of the print industry. The 'packaging day' is Thursday, 6 April.

Ipex covers just about every sector of the graphics industry, which means labeling is a small fish in a very large pond. Nevertheless, a visit could still be worthwhile for converters because shows like this offer useful pointers. An added attraction this year is a dedicated flexible packaging area in Hall 1, which looks like becoming larger than some packaging shows in their own right. Exhibitors include Cerutti Group, Comexi Group, DCM Group, BHS, SOMA Engineering, CMR, Polywest Sleeve Systems, Kampf, AVT, J M Heaford and AV Flexologic. There is also a Flexible Packaging Center of Excellence. It features daily 30-minute presentations on best practice case studies from companies like IST, Luscher Flexo,

Drent Goebel, Kodak (Creo), Alphasonics, Agfa and GEW. Hall 1 also contains the multi-faceted Print City based around a diversity of print production exhibits, several with a packaging interest. Pre-press techies will not want to miss the Process Automation and JDF Pavilion in Hall 20. It will highlight the integration of data flows between software systems from different vendors. The Pavilion is organized by CIP4, which developed the Job Definition Format (JDF) and complementary UP3I digital printing communications interface.

Preview information available from exhibitors at time of going to press:

AB Graphic International - Hall 1, G68

Features the Ti150 Label Converter, an entry-level device that allows the integration of RFID and EAS tags into rolls of pre-printed and die cut labels in a single pass. Also featured is the Omega SR410 label inspection rewriter with die cutting. The Omega SR features electronic web guidance with ultrasonic sensor suitable for opaque and clear substrates. A control panel with integrated functions permits easy operation and job set-up. Also shows an Omega converting line complete with die cutting station and Vectra STR, servo driven, turret rewriter.

AB Kelva - Hall 1 E 45

AB Kelva will introduce a new concept for wide web contact cleaning. The WWCMR (multi-roll system) prevents printing

defects and reduces machine downtime by removing loose contamination on the web surface. It provides easy side pull access to adhesive with a high level of safety for the operator. Through the multi-roll system handling weights are kept to a minimum providing a good ergonomic environment.

It can be incorporated on web widths between 1500 to 2100mm, and will operate at web speeds up to 500 m/min. Double or single sided cleaning is possible and anti-static equipment is built in.

Alpha-Cure Ltd - Hall 4, A60

Shows a representative selection of replacement UV curing lamps. The company produces over 4,000 different types of lamps for a variety of applications. They include equivalent lamps for all leading UV units produced worldwide which are offered at competitive prices. Alpha-Cure recently opened a third factory to improve capacity and lead times.

Alphasonics - Hall 1, D52

A range of ultrasonic cleaning products and services include examples of Alphasound Dual Frequency anilox cleaners. Also shown are the AS1000 washer for UV lamp units, PC500 flexo plate cleaner, a 'through chamber' anilox cleaning set-up, and an offset blanket wash system.

Artwork Systems - Hall 9, E35

In addition to the ArtPro and Nexus pre-press systems, the company will show its version of Odystar for the packaging and label sectors. It is suitable for automating workflows with templates where straightforward work with minimal changes is involved. The system can be integrated easily with RIPs and workflows from other manufacturers: proofers, imagesetters and platesetters become PDF 1.5 compliant devices. Odystar runs on a Macintosh OSX platform and provides an extensive range of automatic pre-press processes including preflighting, correcting, advanced trapping, step and repeat, proofing, screening and printing.

AVT - Hall 1, D65

Features automatic defect detection systems for the packaging and label printing markets that are said to offer process control and 100 per cent quality assurance either on-press or on a rewinder, including register and pressure control data, in-line color management, bar code verification solutions and job quality data management. The stand includes an AB Graphic Omega SR330 label inspection rewinder with AVT camera inspection system.

DALiM Software - Hall 6, B56

A series of automated workflow tools, including JDF-enabled applications, include a new version of DALiM TWiST running under Mac OS X that enables XML-driven production workflows and JDF-driven file preflighting. A new SWOP-certified version of the DALiM DiALOGUE soft proofing system for Mac OS X allows remote and collaborative viewing and soft proofing of various high-resolution files. DALiM MiSTRAL Pack, a dedicated version for the packaging industry, adds new job tracking features. The company will also demonstrate seamless integration with several third-party MIS systems and announce new partnerships at the show.

DiMS! - Hall 20, C15

Features live demonstrations of the new 700 software release of its management information system for medium to large users. Functions include Packaging Estimation Wizard, claimed to offer a fast way to create estimates and quotes for label and packaging products and includes contract management. Advanced Production Tracking is another new DiMS! module. It provides complete tracking of all production material whether raw material or work-in-progress inventory. It integrates with the iPlan scheduling module to enable real-time visibility across the entire business of job status, time usage and inventory.

Domino Printing Sciences - Hall 2, F40

Demonstrates its high speed K200 printer from the K-Series of drop-on demand ink jet printers. It delivers fast and accurate 316dpi printing at 90 meters/minute, which equates to a speed three times higher at the same print resolution. Also shown is a prototype of Domino's first process color drop-on-demand printhead based on UV-curable inks. It is designed for integration within into existing print production lines, giving users a flexible digital printing capability said to be considerably cheaper than with stand-alone digital presses. Also shows the Bitjet+, a new solvent-based high-speed printer for variable data applications, and the Editor GT control and scanner which can read bar codes through closed mailer envelopes.

Drent Goebel - Hall 5, E15

Highlights the latest application for its multi-function VSOP offset sleeve press. DG says the first VSOP was launched at IpeX 2002 and since then it has installed over 40 presses worldwide of an extended range. At the show Drent Goebel is extending an invitation to visitors to visit a UK customer and watch a VSOP press under production conditions (contact marketing@drent-goebel.com for details).



Edale - Hall 4, E45

The company will focus on the advantages for offset printers to diversify into flexo printing. Edale will show a four-color Alpha press with 250mm web width, equipped with cold foiling and MBS-5 UV lamp heads from IST. The company claims it exemplifies the comparative economical advantages of flexo with its relatively lower costs, quicker set-up times and the possibility of shorter runs for producing a variety of jobs. Information on Edale's full range of presses: the modular Beta, servo driven Sigma and the newly-launched Lambda will also be available.

Edelmann Graphics - Hall 5, E10

Showing on CP Graphics' stand is a print tower from Edelmann's latest press, the Evo-Print V48. Based on the Color Print series, it is targeted at the short/medium run direct mail and commercial market. Also shown is a new scissor-cut sheeter which runs in-line with any conventional or digital web-fed press to a web width of 520mm. Given a constant web tension, the servo-driven sheeter has a tolerance of +/- 0.2mm and achieves 100,000 A4 sheets/hour. Daily presentations on a Color Print press include applications for labels and packaging, as well as commercial products.

Esko-Graphics - Hall 9, G50

Introduces Scope, a workflow system that integrates several software products for commercial print and packaging service providers. Functions range from job management to graphic and structural design, as well as pre-press and platemaking. Scope works with open industry standards such as JDF and PDF, and most common MIS and database systems. The company will demonstrate how converters can integrate various JDF enabled applications into packaging pre-press workflows. A similar theme, based on CIP4 standards and real-life production set-ups, continues with Esko-Graphics' contribution to the Packaging Integration Center, which forms part of PrintCity in Hall 1.

GEW (EC) - Hall 1, D70

The new e-System UV curing mini lamp head features a single-phase 4kW power supply. Described as ultra-compact, lightweight and stackable, the system is energy efficient and comes with a patented reflector. It is suitable for press widths up to 350mm. The e-System family also includes lamp heads configured for specific tasks: VCP models are designed for narrow-web presses up to 500mm wide, the eCP lamp head is for mid web presses (from 450 to 750 mm) and the hCP with water-cooling is designated for wide-web presses (up to 150cm). GEW lamp heads are based around the new e-Brick

electronic power supply, which increase UV power efficiency by a minimum of 10 per cent.

GMG - Hall 6, B20

Its range of high-end digital proofing and color management tools includes the GMG ColorServer, a new tool for automatic color conversions. GMG ColorProof offers an accurate way of calibrating digital ink jet proofing engines to produce contract color proofs. Included is GMG DotProof for outputting digital halftone contract proofs and GMG FlexoProof, designed specifically for flexo printers. GMG will also show GMG ProofControl for digital proof quality monitoring and GMG InkOptimizer for gaining ink savings.

Hewlett Packard - Hall 4, B25

Ipx 2006 sees the formal launch of Hewlett Packard's Graphics and Imaging Business Unit covering its commercial and industrial digital color printing applications. It introduces the mPrinter 4000, a high-speed ink jet variable data marking and coding printer from HP Specialty Printing Systems. Applications include labels, direct mail and packaging. Shown printing labels and film sleeves, the HP Indigo ws4050 is augmented by ABG's Omega Digicon HS converting line, featuring the Digital Laser Workflow (DLW) with Omega Sabre eXtreme laser die cutter. The package permits non-stop digital label production from downloaded job file through to printing, varnishing, laser die cutting, stripping, slitting and rewinding. Also featured is a new, off-line flexo coater for priming label substrates.

Another HP partner is the Creo Print On-Demand Solutions (PODS) Group, a unit of Kodak's Graphic Communications Group. It will launch the Production Stream Server for supporting HP Indigo presses in a workflow.

IST METZ - Hall 4, D45

The company's narrow-web UV curing program includes the newly introduced MBS 5 UV lamp module. As a result of new URS reflector geometry the MBS 5 system offers increased UV output while at the same time reducing energy consumption. This offers a new concept in improved energy efficiency, using lamps at 140W/cm with equivalent UV output to 160W/cm and 200 W/cm without incurring a further increase in power consumption. This has brought noticeable savings in energy cost says IST. In addition, IST will exhibit its BLK 2 and BLK U systems, water cooled UV and inert (oxygen reduced) units for the flexo sector. Both systems feature FLC (Fast Lamp Change) units for reduced maintenance.

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Hall 01
Stand C25



The Atlas OCW-2 slitter rewriter



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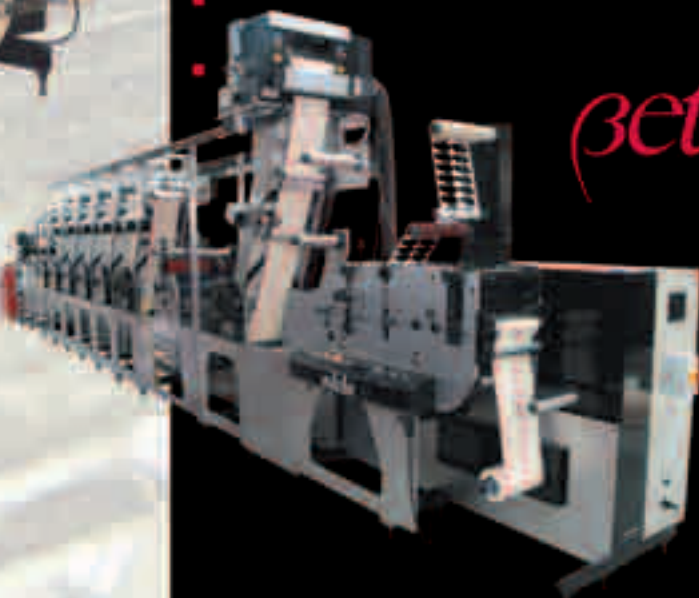
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Positive Focus - Hall 20, D45

Features the latest upgrade for Global Graphics' Jaws PDF Creator v4.0, which is now compatible with Mac OS X10.4 and joins the earlier release for Windows and Jaws PDF Server 4.0. Jaws PDF Creator is claimed to offer a low cost method of creating quality PDFs with controllable specifications from any printable application or from pre-existing PostScript or EPS files. The latest version is especially applicable to the graphics and desktop publishing applications favored by professional Mac users.

Primarc UV Technology - Hall 4, F22

Displays a range of medium-pressure mercury arc lamps and electrodeless microwave bulbs which are suitable for all known UV curing systems. Primarc says all its UV curing lamps are manufactured from high-clarity, vitreous silica, or quartz, to the ISO 9001:2000 standard.

The company also offers a series of mercury vapor lamps with metal halide additives. These create specific wavelengths of UV radiation to match the photoinitiator being cured. Standard Quadcure lamps developed under an OEM agreement with Nordson UV are now guaranteed for a lamp life of 1,500 hours with consistent UV output.

Print Concept - Hall 5, E10

Print Concept will feature a Nitrogen Inerted uv curing system on CP Graphics' stand. It is aimed at the flexible packaging market, particularly where low odors and high gloss are key criteria. The Nitrogen Inerted process ensures that the free radicals generated are used in the curing process allowing reduced usage of photo-initiators and energy. Also shown are air and water-cooled lamps designed for narrow-web flexo and offset presses. Applications include labels and film products.

RK Print Coat Instruments - Hall 5, F45

Introduces the latest VCM (Versatile Converting Machine). Machines are custom built with a choice of printing and coating systems for developing coated products, testing substrate receptivity, quality control purposes, specialised PS-tape/label production and developing security-related products. Also shows the FlexiProof 100 and FlexiProof UV multitasking bench top systems that can be used for color matching, preparing customers' samples, R & D and quality control purposes.

Schober - Hall 2, E25

Features converting machines for RFID products and smart labels, including a machine to insert tags, or inlays, under pre-cut pressure sensitive label stock. It is available for HF or UHF labels and tags. Selected readers are upgradeable in order to meet the growing demand for EPC standard Gen 2 Tags, used for supply chain management, asset management, container identification, palette and case tracking. Also shows the STP (Smart Tag and Ticket Processor), designed for producing contactless readable tags and tickets used for mass transit, entrance/ access authorization, security identification and monitoring, as well as baggage tracking and sorting.

Screen - Hall 6, B40

A new series of workflow suites and software modules includes applications for label, packaging and digital printers. They include a fully JDF-enabled capability to integrate several complementary third-party products, including MIS. The products comprise: Rite Suite for customer management with Certified PDF creation, the Trueflow Suite for production management with intelligent RGB conversion, trapping and RIPping, and the Color Suite for quality management. Its automated tools include SpektaColor, a new tool that allows the conversion of RGB or spot color files into process or extended process colors.

Shuttleworth - Hall 20, B60

New MIS modules include Shop Floor Data Collection with a browser-based data collection feature and a wider choice of collection devices, including touch screens, PDAs, PCs and Macs, to securely interrogate the job, identify the status of associated transactions and view related images.

Web to Print is said to aid the smooth transition from the design and approval of an order on-line to direct production, including for labels and packaging. Shuttleworth will feature the integration of MIS with JDF enabled workflows, including those for packaging and labeling converters.

SOMA Engineering - Hall 1, D31

Featured is the latest version of the company's Pluto slitter/rewinder line. The 110cm wide version has pneumatic knife holders and a laser core guiding system. There are two larger models, in widths of 135cm and 160cm for maximum speeds up to 400m/minute depending on substrate specification. Information will also be available on its range of CI flexo presses, laminators, moulder/proofer, sheeters, die cutters and special purpose machines.



Turning Point Technologies - Hall 6, B40

Integrated workflows for multiple applications include design, printing and packaging. Featured are software suites from DALiM Software, Xinet, Lüscher and Triple Triangle. Several new products will be announced at the show. The company offers bespoke systems and will host a Bespoke Software Service and Color Clinic at IpeX.

Xeikon International - Hall 4, C40

Displays center on the roll-fed Xeikon 330 for label printing, using CMYK and a fifth unit for opaque white or spot color. Maximum speed is 14.7 m/min (48 ft/min) independent of the number of colors used or the size and positioning of labels on a 330mm web width. The X-800 Digital Front End also offers variable data printing and processing capabilities. Xeikon will also publicize a new venture into heat seal transfers and garment labeling, following a co-operation agreement with Digital Screenprinting Technologies Aps (DST), based in Copenhagen. Users can produce transfers in either roll-to-roll or roll-to-sheet form, with a variable data facility allowing the inclusion of original content.

XSYS Print Solutions/Flint Group - Hall 5, G85A

The unveiling of Flint Group, the new name of the holding company created by the merger in late 2005 of European-based XSYS Print Solutions and American-owned Flint Ink Corporation. Flint Group's global ink business serves the narrow-web flexo, sheet-fed and web-fed offset, gravure, energy curable and specialty printing sectors. Its Printing Plates division covers the flexo and letterpress sectors, and includes plate processing equipment. The Jetrion LLC division provides enhanced digital inks, ink jet printers and services for on-demand and variable data printing applications.



IpeX 2006 – The essential Information

Opening times:

4-8 April	09:30 – 17:30,
9 April	10:00 – 16:30,
10 April	09:30 – 17:30
11 April	09:30 – 16:00

Distribution of exhibits:

Hall 1	PrintCity, Flexible Packaging, Post-press and Converting
Hall 2	Post-press and Converting
Hall 3	Post-press and Converting
Hall 3a	Xerox
Halls 4 & 5	Printing: Machinery, Appliances, Accessories
Hall 8	Heidelberg
Halls 6,7, 9 & 20	Pre-media and Pre-press

Note that visitors can register free of charge in advance by completing a registration form or registering on-line at www.ipeX.org. The benefits include a free show planner and you avoid the queues, but best of all you avoid paying the £30 entrance fee that non-registrants must pay. Order registration forms at +44 (0)870 429 4592.

How to get there:

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Market driven growth for sleeve labels



Sleeve labeling is now at the forefront of brand image decoration, tamper evident solutions and promotional messaging thanks to the pioneering work of companies such as Decorative Sleeves. **Mike Fairley** talks with the company and reviews the growth of sleeving applications and technologies

Look at the annual growth statistics for the different label technologies in any of the developed or emerging markets, or browse through the pages of most leading packaging and brand magazines, and it's almost certain that sleeve labeling will be at the forefront of international label growth and global label solutions innovation. Certainly, sleeving is very much one of today's 'in' labeling technologies.

Originally invented in Japan in the mid 1960s by Fuji, shrink

sleeve labeling has long been recognized as an ideal method of decorating all manner of products due to its ability to provide high quality images, tamper evident solutions and promotional messages on a wide range of bottle and container shapes – even those that have irregular contours or unusual shapes. The initial uses of sleeves was actually for contract packaging and banding for 'two-for-one' product applications.

Key to the changing role and rapid development of sleeve label



Shrink sleeves prove an effective replacement for direct printing on this range of cream products

technologies were the attempts in the USA and Europe during the 1980s to maliciously tamper with products such as Tylenol and Heinz baby foods. As a result, all baby foods quickly moved to tamper-evident shrink sleeves for brand security and enhanced customer confidence. Supermarkets too, started to demand more tamper evidence on their products and, as a consequence, shrink sleeving quickly moved into a range of new markets and applications.

Today, sleeve labeling has undergone further rapid evolution through advances in shrinkable films, printing processes and techniques and end-user environment issues to become a global label market worth in excess of \$1,000 million, with annual global growth in excess of 10 per cent – nearer 20 per cent in some of the world's emerging markets.

The major global market for sleeve labels is still in Japan where it was first developed, but even in Europe and the States, the current sleeve market is estimated to be in excess of \$200 million in each market – and still growing rapidly, driven by the marketing needs of brand owners for enhanced brand recognition, brand differentiation, brand loyalty and brand shelf-appeal and stand-out. All areas in which the 360°, high quality, full height, decoration with sleeve labels excels.

Growth of sleeving for branded product decoration is also being pushed by key technical advances in shrinkable films, in printing processes, in origination techniques, in inks, and in the environmental solutions that sleeving can offer. A greater awareness and importance of brand identity, the growth of added-value products, high shelf impact labels and cost improvements in bottle decoration, such as down-gauging, have also been instrumental in driving sleeving to new heights.

Reverse-side printing of shrink label films to provide scuff and scratch resistance of printed inks and varnishes, as well as durability in all environments (bathroom, chill and freezer cabinets) has also aided market penetration – particularly against wet-glue applied labels and, to a lesser degree, self-adhesives. In addition, the product range for sleeve labels now includes promotional sleeves (twin packs and club packs), high quality sleeve labels, multi-function and multi-market sleeves,

tamper evident solutions, decorative bottle seals and security seals - as well the introduction and growing usage of stretch sleeve labeling. Certainly, sleeving is much more versatile than many other methods of labelling.

For Decorative Sleeves, a European market leader that supplies over 700 customers from plants in the UK and Austria, the growth and adoption of high quality sleeving solutions by global beverage and milk drink brands has been a major opportunity – and success for the company – with some 40 per cent of their UK produced sleeve labels being exported.

Founded in the UK in 1979, Decorative Sleeves produce shrink sleeve labels at facilities in Kings Lynn and Castleford in the UK. In February 2000 Decorative Sleeves became part of ITW Inc. Eith operations at the Auto-Sleeve plant in Volkermarkt, Austria, from where stretch sleeves are also produced, together with sister operations in the United States and Brazil, a global business has been created to meet the needs of a worldwide customer base.

Since becoming part of ITW, the Castleford operation has moved into a new building and re-structured, now servicing 20 key global brands with long-run, cost-competitive sleeves from a modern state-of-the-art facility using a 10 color Cerutti gravure press. Production is totally dedicated to providing the most efficient service to these brands – which include Nestlé, Coca Cola, Diageo, Unilever, Arla, etc.

At Kings Lynn, production and service has also been re-structured to meet the requirements of the 80 per cent or so of customers that require shorter print runs or unprinted tamper seals, plain banding sleeves and product protection solutions. Investment in this factory is different to that at Castleford and has included the setting up of a flexo business unit using both CI and UV flexo presses. In Austria, where 80 per cent of production is stretch sleeves, printing is undertaken with CI flexo presses.

Unlike some of their competitors, Decorative Sleeves do not manufacture their own shrink film. As the biggest user of such films in Europe they work closely with film manufacturers to develop new products and solutions. Currently, PVC is the dominant substrate used for sleeve labels, both in Europe and



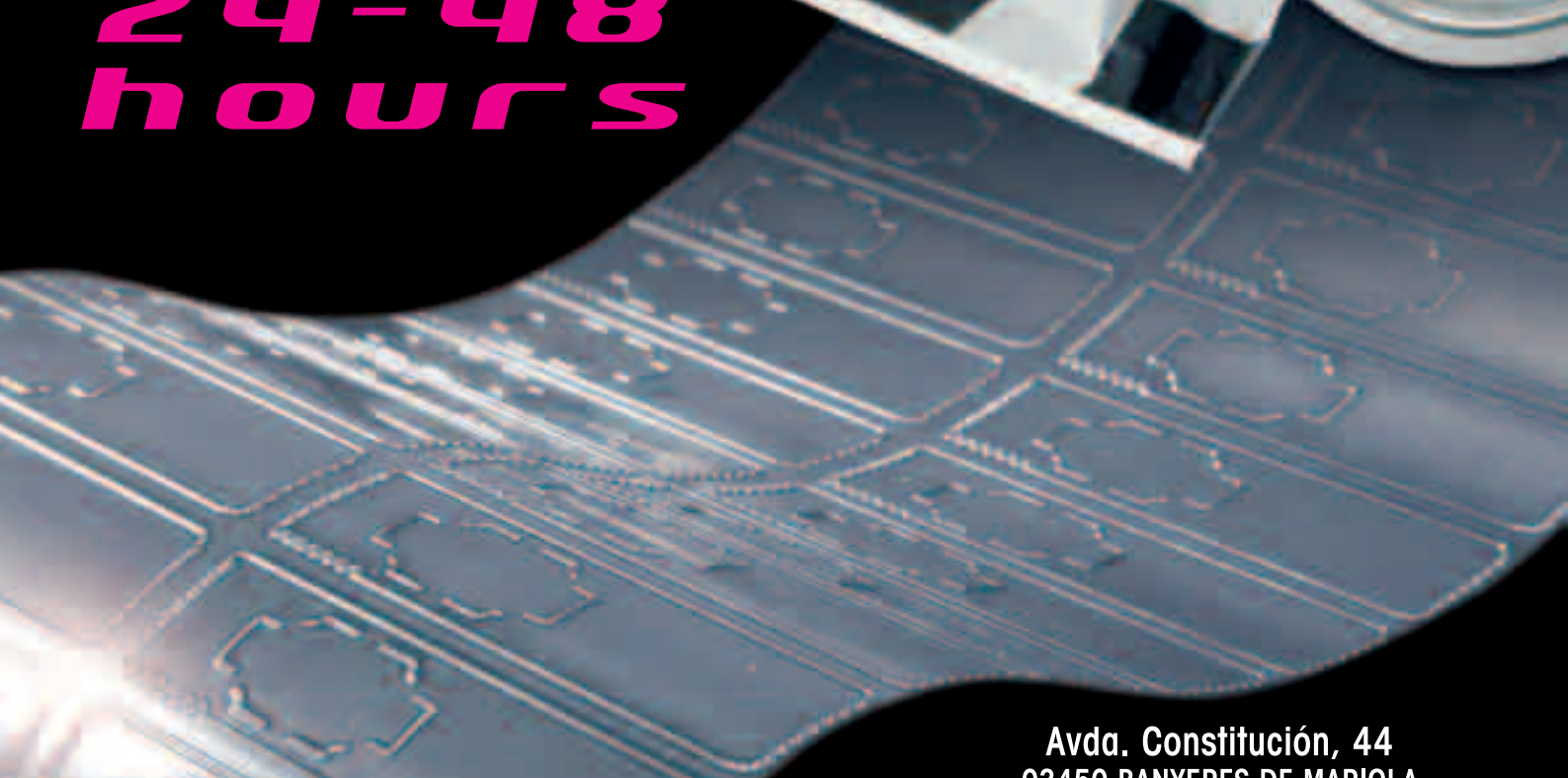
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globally. Of the films used, PET offers the highest percentage of shrink, the best scuff resistance and can be pasteurised (but is the most expensive), while OPS is an excellent film for squeezable containers, is more cost competitive than PET, and offers excellent control in the shrink process.

Similarly, Decorative Sleeves do not develop sleeve application machinery. They prefer to work with the major equipment suppliers and let their customers choose from the wide range of available machine models that are on offer. However, they do provide an advisory/consultancy service for customers looking to install equipment. Decorative Sleeves also have the capability to source the machine for the customer and can offer a range of financing options as required.

To keep up with and advise brand owner of changing requirements, technology and materials trends, market changes, security and environmental issues, etc, is a key part of what Decorative Sleeves looks to offer customers. Certainly, much of what they produce is highly creative and innovative. 'We have many product solutions that differentiate sleeve labels from other labeling technologies' says Jon Cowan, sales director for the company. Labels on unusual contoured bottles for example, exciting 360° promotional sleeves, multi-variant possibilities on single origination collectibles, removable sleeves with scratch and win features, unique serial numbers on the inside of the sleeve, single application sleeves which incorporate tamper evidence, innovative finishes including high lustre, UV glow, tactile leather, 3D vision, thermochromics, scratch-and-sniff and fluorescents.

'As for the future, we are looking at a wide range of new films that are scheduled to come to the market in 2006,' adds Jon Cowan. 'These include low density materials with significant benefits for recycling, new co-polymer films which will be comparable to PET for shrink percentage and clarity and with the potential to reduce film gauge, and very high metallic reflectance and holographic films.'

'Press and origination trends today include a much greater use of non-gravure printing, particularly for the use of UV flexo and offset. Pre-production too, has advanced rapidly in recent years and everything is now totally digital, whilst almost all pre-distortion of images is now computerized.

'Other new developments include advances in tactile sleeves. That is, those that have a soft touch to them, or have an orange peel or embossed effect. Like other label sectors, sleeve labels are also becoming smarter, with color change, touch sensitive, barrier protection, heat insulation and UV or process resistant films. Digital printing is also beginning to offer unique personalization and very short run capabilities to the sleeve producer.

'In the sleeve application machinery arena there are also new developments. At Drintec 05 in Munich there were a number of significant new launches such as Comag who have



introduced an integrated applicator and tunnels; SIG/Simonazzi now offer on-machine welding; while Krones have multi-sleeve simultaneous application machinery. All these developments will help to further expand the sleeve labeling market in the coming years.'

Already there are more and more converters – especially flexible packaging and self-adhesive label converters – entering the sleeve market (now believed to be close to 100 in Europe) to provide increasing competition to the market leaders. What seems certain is that Decorative Sleeves is well ahead of most of the market in terms of European market share, brand owner service, innovation and creative solutions.

They can bring new products and ideas to the market in just a few weeks, offer one of the widest ranges of brand image and brand security solutions, have many new ideas, materials and products in the pipeline, and look on target to build the pan-European – and global – base that is a key part of their long-term strategy.

Anybody that looks at their portfolio of successful sleeve solutions for global, pan-European and national brands can have little doubt of their continued ongoing success in the years ahead. ■



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UPM shows off \$120m US label investment



The UPM group has invested in excess of \$120 million in self-adhesive labelstock and RFID production in the USA in recent years. **Mike Fairley** reports from the Group's recent successful Pro Label Day in North Carolina

More than 250 guests from the label, RFID converting and coating industry supplier sectors attended the recent Pro Label Day held at the historic Grove Park Inn Resort in Asheville, North Carolina, and at the Raflatac facility in Fletcher. The event included presentations by Raflatac, Procter & Gamble, UPM Rafsec, HP and the Venture Development Corporation; RFID technology demonstrations; a ceremony and tour of Raflatac's new North American facilities and production equipment followed by an evening reception with dinner and dancing.

In welcoming the guests, Dan O'Connell, President, Raflatac Inc and Jouko Lahepelto, senior Vice President, outlined the major new investments of some \$40 million by parent company UPM in installing additional state-of-the-art coating and finishing facilities at the Fletcher manufacturing center and the opening of a slitting and distribution terminal in Wilkes-Barre, Pennsylvania. The new high-speed coater, which utilizes Raflatac's own proven, proprietary coating technologies, sets new standards for speed, efficiency and consistency, and will focus on manufacturing high quality thin films and hot melt adhesive labelstocks.

Fabricated and installed in less than a year, the coater went into production in October 2005, with hot-melt production scheduled to commence in early 2006. The coater is additionally complemented with the installation of a new film slitter. Raflatac will further focus on extending its finishing capabilities, adding capacity in all markets, increasing the products and services available to all terminals, and in offering larger coils and longer reel lengths to meet growing customer demand.

'Our investments are paying off as our customers embrace our

"The new high-speed coater, which utilizes Raflatac's own proven, proprietary coating technologies, focuses on manufacturing high quality thin films and hot melt adhesive labelstocks"

new capabilities and give us increased business' said Dan O'Connell. 'The new technology demonstrates our commitment to creating best-in-class production and distribution for the North American market. Total investment since 2000, aimed at positioning Raflatac as the number two supplier of self-adhesive paper and film labelstocks in North America, has now exceeded \$100 million, together with a further \$28 million investment program to begin RFID production in the USA'

'Labelstock growth in the US since the first coater was installed' added Mr O'Connell 'has averaged 30 per cent a year and now makes up around a quarter of Raflatac's global turnover.' Quite an achievement in just five years.

For UPM Rafsec, the year 2005 had also been one of tremendous change, with the opening of a brand new UHF RFID tag production facility, also in Fletcher, North Carolina, in September 2005. This has been followed by a major



announcement of a market breakthrough in the bulk pricing of UHF Gen 1 and Gen 2 tags at a sub-10cent price level, together with the introduction of a 'One-Tenna' antenna design that will work anywhere in the world. Available in wet and dry formats, and with an average yield of 98 per cent, these new UPM Rafsec EPC-compliant Gen 2 tags offer

customers all the advantages needed to commit to mass adoption of this innovative technology.

Lower-cost, bulk pricing will also make RFID a feasible solution for labeling a wide array of consumer and industrial goods. 'The market has been waiting for a high quality, low-cost product that delivers superior yields' said Jan Svoboda, Business

Development Director, UPM Rafsec. 'We expect to see strong demand for our Gen 2 tags over the coming years as industry customers move to capitalize on RFID's incredible advantages.'

Outside of North America, both Raflatac and UPM Rafsec are also implementing a strong global expansion strategy with further major investments in Europe and Asia. 'In Europe, Raflatac is modernising its Tampere-based film lamination line in Finland so as to double film production capacity' says Heikki Pikkarainen, President, UPM Labelstock Business 'and we will also open a new \$40 million production facility in Changshu, China, in early 2007.

'Our growth strategy is truly global in nature' he added. 'We want to serve all major markets with our innovative products and services. Our goal is to become the number one global choice for label converters everywhere we operate.'

Complementing the Raflatac and UPM Rafsec speakers at Pro Label were Bryan Edmonson, Purchasing Group Manager, Procter & Gamble, Greg Matula of HP, and Michael Liard, Director of AIDC/RFID Practice at Ventures Development Corporation (VDC).

In looking at Procter & Gamble's brands and their requirements for labels, Bryan Edmonson said that his company had a portfolio of more than 300 brands, ranging from Head & Shoulders, Ariel, Charmin and Crest to Gillette, Duracell, Olay and Pampers, of which the top 22 brands alone each had annual sales in excess of \$1 billion. Seventeen of those 22 top brands utilized self-adhesive labels.

'Packaging and labels today' he explained 'were the number one methods of communicating to consumers, with some 75 per cent of all buying decisions being made at the point of

purchase. This meant that Procter & Gamble was dependent on retailers to sell the company's products; the retailers were not dependent on Procter & Gamble. Retailers were therefore able to look closely at margins they earned from branded products, and then use that data to put pressure on brand owners to year-on-

year improve costs, offer enhanced functionality and quality, and push for greater customization and to optimize supply chains.'

'This all meant that Procter & Gamble were looking to the label industry to help them respond with innovative label solutions, offer more creative designs, help to simplify the broad range of specifications, support supply chain innovation – and work with them to drive down costs.

For Greg Matula, speaking about the HP RFID Program, the challenge was to utilize RFID throughout their supply chain. 'Already' he said 'we are tagging products per retail channel partner in some 26 facilities world wide and, in the last 12 months, had contributed around 10 million uniquely programmed EPC Class 1 tags into the retail supply chain.

'RFID' he explained 'is not a replacement for printed bar codes. They will co-exist with RFID tags for quite some time. However, labels are the delivery mechanism for RFID tags and, as we have to apply labels anyway, it makes sense to incorporate the RFID element into the existing labels we use.

'We are continually looking at the return on investment around the continued and expanded use of RFID in the supply chain and in manufacturing operations. Used to record movement of products and goods automatically, RFID tags were the building blocks used to improve their business and operations throughout the supply chain. They enable us to track everything through manufacturing, storage, shipping – and what has happened to it – and to enhance security and counterfeiting issues. The benefits of RFID therefore come from its impact on the entire product lifestyle.'

In terms of the global RFID market, Michael Liard of VDC, said that he expected RFID to be a \$6 billion business by 2008, with the value of the RFID Smart label market exceeding \$554 million in applications calling for case and pallet tracking, item-level tracking and anti-counterfeiting in pharmaceuticals and life sciences, and in transit and ticketing.

'A significant portion of RFID tag costs come from the label converting processes, which are largely due to the current lack of economies of scale and the wide variety of tags' explained Liard.

“Outside of North America, both Raflatac and UPM Rafsec are implementing a strong global expansion strategy with further major investments in Europe and Asia”

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“Overall, the Pro Label Day proved to be an outstanding success – both in providing valuable information to label converters and in launching the new coating and RFID production facilities in North Carolina”

‘Although the number of label converters engaging in RFID is growing, it is still limited when compared to overall converter capacity. Margin pressures were also making label companies re-evaluate the market and investment decisions. Currently chip vendors were partnering with label converters to offer solutions.’

Michael Liard then went on to examining how label converters could reduce smart label costs, establish and communicate a cohesive, streamlined RFID message and, most importantly, put themselves in a position of a value-added solutions provider.

Overall, the Pro Label Day organised by Raflatac and UPM Rafsec, proved to be an outstanding success – both in providing valuable information to label converters and in launching the new coating and RFID production facilities in North Carolina.

With the new coating line already at 50 per cent capacity after just one month it seems certain that Raflatac can look forward to continuing their 30 per cent per annum labelstock growth in North America. RFID growth already seems assured and this should be met by the RFID inlay facility that has been opened.

Undoubtedly it cannot be too long before the label world hears of new Raflatac and UPM Rafsec investment decisions for the North American market. ■

Labeling news

Smith & McLaurin invest

Smith & McLaurin, manufacturers of coated papers for variable information printing applications, have completed a major investment in a specialty coating machine that will be installed at the company’s Kilbarchan Plant in Scotland, UK.

Named ‘Caledonian’, the new machine will enable the company to increase its manufacturing output of the widest range of standard and speciality products in Europe. The coater will be installed to satisfy customer demands for products required by markets including promotional and marketing goods and will also see an extension of the company’s current range of products for the personal care markets.

The ‘Caledonian’ can coat up to 1530mm, works exclusively with water-based adhesives and has a highly versatile coating system that enables the production of coat-weights from 3gsm to 30gsm.

The company said in a statement: ‘Customers will also benefit from flexible and changeable strip coating patterns that can be altered without significant downtime or cost due to the advanced technology utilized to produce strip-coat adhesives for dry peel applications and also on standard permanent and peelable grades. The versatility of the production capability enables low volume output to be supplied as standard.

‘The versatility of the ‘Caledonian’ will enable Smith & McLaurin to produce a wide range of materials including ‘self-wound’ and the facility to produce more clear face materials including ‘clear-on-clear’ that is high in demand for the personal care markets amongst others.’

Comco to print film labels in Azerbaijan

In a move which shows the growing economic importance of the Oil-rich Caspian Sea region, Mark Andy has clinched an order for a 22’ (560mm) Comco ProGlide MSP line from Kraton Printing Company in the capital city Baku. The eight-color Comco, which will be fitted with four print stations combining GEW UV curing with hot air drying, is intended for the production of short to medium runs of wrap-arounds, shrink sleeve labels and flexible packaging.

Commenting on the machine order, Walter Eitner, sales manager at Mark Andy AG, Switzerland, said: ‘We are delighted to have secured the order from Kraton because it rewards the effort put in by our distributor, Aras Grup, who negotiated the sale through their offices in Istanbul.’

Kraton Printing Company is already a Mark Andy user, having installed a 16” (406mm) seven-color 4150 flexo line in 2002. The 4150 features full cold mirror UV curing and will in future concentrate on label production, with the more specialized film work being transferred to the new Comco when it is installed in June 2006.



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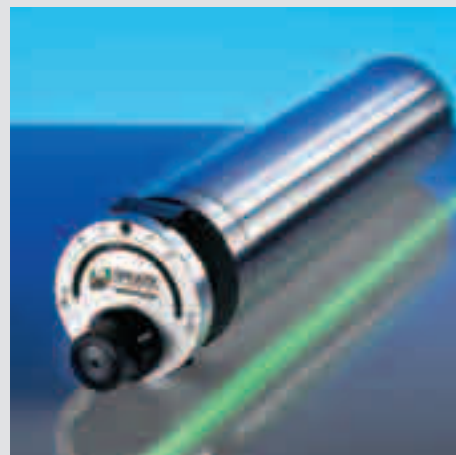
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Exchanging print cassettes on the Castagnoli Galileo rotary UV offset press

GIDUE expands into rotary offset

UV flexo press manufacturer GIDUE has sealed an alliance with UV rotary offset specialist Castagnoli, giving the company a wide range of print technologies and press widths in the narrow and mid-web web converting sector. **Andy Thomas** reports from Florence, Italy

GIDUE S.p.A. and Nuova Castagnoli S.r.l. have announced an alliance for the development of UV offset technology. The two companies will share technology and distribution networks, with GIDUE being responsible for sales and service activities worldwide for the printing units. Federico d'Annunzio and Cristina Toffolo, owners of GIDUE, consider this alliance strategic for the future development of both GIDUE and Nuova Castagnoli.

'UV offset technology will compliment our existing portfolio and provide substantial improvement to the growth of the company,' comments Federico d'Annunzio. 'The technology Nuova Castagnoli S.r.l. has developed will positively change the perception of UV offset printing in the label market. It is a further step towards standardization in the label industry while at the same time reducing the production and operating costs of the label manufacturing process.'



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“The first objective of the two companies is the launch in the second half of 2006 of a new press line, designated Xpannd, that will bring together the best technical and electronic design features from both organizations”

The first objective of the two companies is the launch in the second half of 2006 of a new press line, designated Xpannd, that will bring together the best technical and electronic design features from both organizations.

Located in Florence, Italy, and founded 27 years ago, Nuova Castagnoli S.r.l. is best known as a manufacturer of rotary offset presses for the business forms market, and since 1979, the company has delivered over 1,000 offset printing units. However, the business forms sector has been in decline for some years, driving forms press manufacturers to look outwards to the growing labels industry. At Labelexpo Europe in September, not only Castagnoli, but also offset forms press manufacturers like Drent Goebel and Muller Martini were targeting label printers with presses adapted



The press hall at Litografia Fiorentina, showing the company's sheetfed and rotary letterpress machines.

with die cutting and film handling capabilities.

The advantage to Castagnoli of the GIDUE alliance, is direct access to GIDUE's expertise in UV flexo combination printing, and in label converting technologies. L&L saw the influence of GIDUE's technical input by visiting two printers in Florence.

Grafica 4- which also started in the business forms market 27 years ago - recently installed a Castagnoli Galileo rotary UV offset press. The decline of the business forms business has led the company to be more creative in targeting specialty markets. When L&L visited the plant the company was printing 500 micron thermoplastic PVC, but the press can be configured to switch between cartons, business forms and pressure-sensitive labels production. Typically, a change between business forms and cartons takes around 20 minutes, with the different web tensions handled by a servo-driven unwind. The press is printing at speeds up to 300 meters/minute.

The basic Galileo press has now been adapted to the requirements of the pressure-sensitive labels market, as can be seen at the installation of a modified machine at Litografia Fiorentina. Litografia was founded in 1969 and specializes in servicing the Italian wine, olive oil and spirits sectors. It started out as a MAN Roland sheetfed offset house, and moved into pressure-sensitive labels six years ago with the installation of two Gallus R160s letterpress machines with flexo varnishing stations.

When considering its next press investment for PS labels, Litografia Fiorentina chose rotary offset, primarily because they could achieve the same print quality as with the Roland press, and because it could handle the antique and other specialty papers traditionally used for wine labels. Litografia

Fiorentina's Galileo press is specified with six UV offset units and a UV flexo varnish station followed by die cutting and matrix stripping. The UV system is provided by GEW. Hot foiling is carried out off-line on a SAM Meccanica machine.

'Over the last 2-3 years we have noticed more and more wine labels moving from sheetfed to pressure sensitive,' says Romano Romoli, owner of Litografia Fiorentina. Today 70 per cent of the wine labels converted by the company are pressure-sensitive. Interestingly, it is not only the bigger wineries moving to PS, but also the smaller vineyards. 'These companies do not like dealing with wet glue around the machine and it is harder to change format on a wet glue applicator, which is important for short run work,' says Litografia's Ramano Romoli. 'For smaller quantities PS papers are more expensive, but because we have in-line UV varnishing and die cutting, the final cost of the label is the same. Printing sheetfed leaves a lot of work in progress between guillotining, punching, UV varnishing and foiling.'

The PS wine labels business is short run, with many jobs as low as 20,000 pieces. Traditionally short runs have been seen as a problem for rotary offset due to high wastage levels and long makeready times.

'Actually, the set-up times and make-ready waste on the Castagnoli offset press are the same as on the Gallus R160s!' says Romano Romoli. 'After a learning process, we are achieving just 10-15 meters waste during makeready.'

A key factor in reducing set-up waste is the slow idling speed of the press. Most rotary offset machines need to run at 40 m/min during set-up to achieve final print quality, which generates significant waste. This is not a problem where the substrates are of relatively low value and run lengths are generally longer - for example cartons and business forms. 'But for PS labels we



The computer controlled inking system on the Galileo press

“Actually, the set-up times and make-ready waste on the Castagnoli offset press are the same as on the Gallus R160s!’ says Romano Romoli. ‘After a learning process, we are achieving just 10-15 meters waste during makeready”

wanted to run the press at just 10-12 meters/minute during makeready,’ says Federico d’Annunzio. ‘Any faster leads to too much waste.’

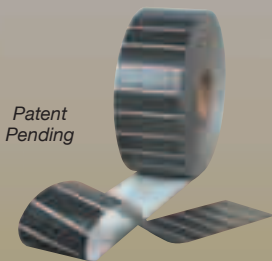
This slow idling speed is achieved by controlling the water fountain roller with an independent servo motor. ‘During makeready we increase the speed of the water and flush the plate to stop ink drying on the plate on machine stop,’ says d’Annunzio. ‘We then increase the speed of the machine for a short time until we are printing high quality labels at 12 meters/min. We adjust the speed of the water as we ramp up press speed. Once we have found the correct curve for the color units on each substrate we can save this ink/water balance setting into the press control computer.’

The inking roller is currently driven from the line shaft, which allows only a linear relationship between press speed and inking speed. The next stage will be a separate motor on the inking unit, allowing inking curves to be set according to the

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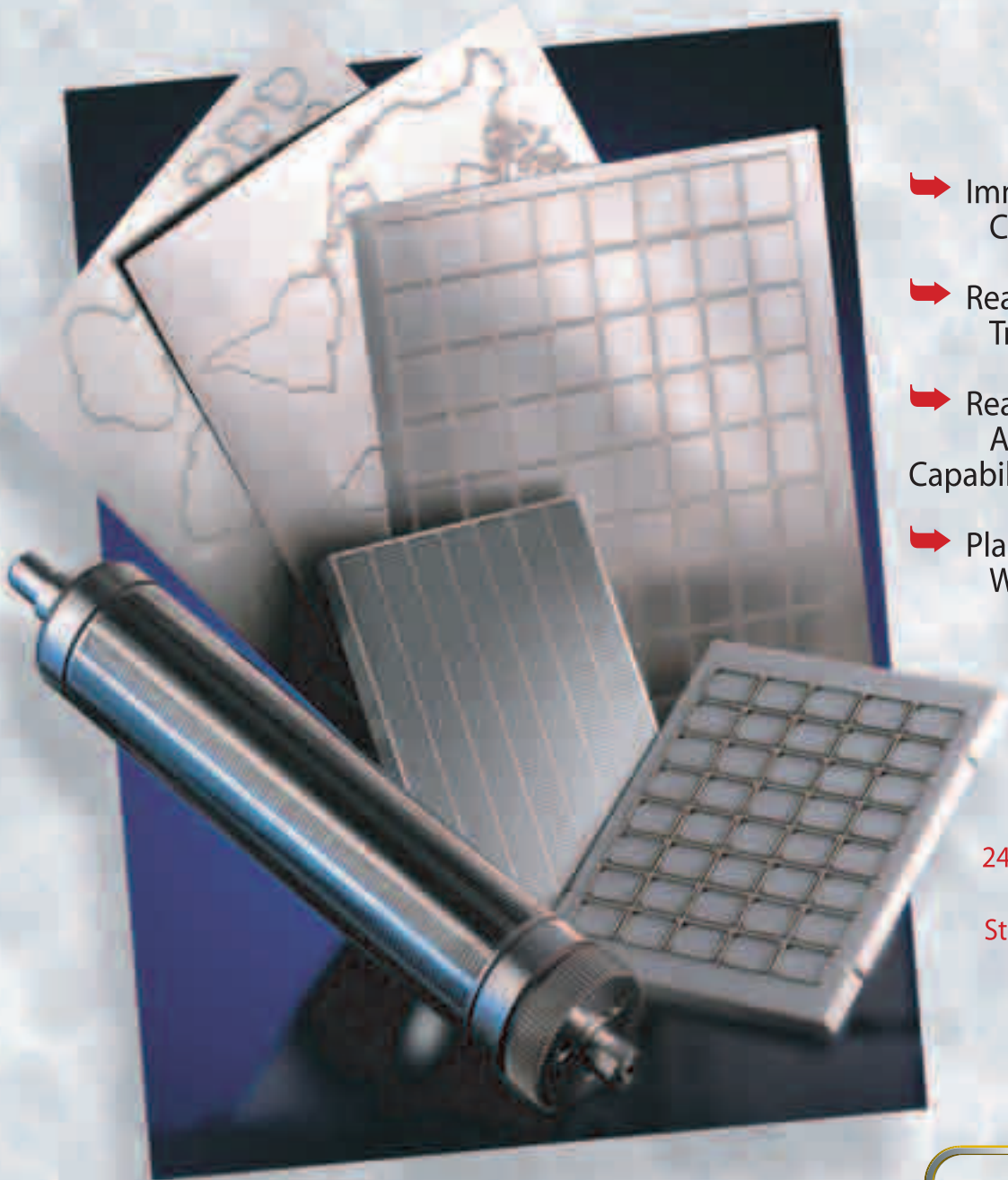
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left to right: Mr. Paolo Romoli (Son of printing shop owner) Mr. Emanuele Papi (Printer), Mrs. Caterina Romoli (Daughter of printing shop owner)

“An interesting feature of the press is the circumferential register control system designed by Castagnoli, and currently at prototype stage”

paper/substrate and press speed.

Tool-less exchange of printing inserts – incorporating plate and blanket cylinders – is another way of keeping down changeover times. For most label applications, four sets of print unit inserts with different repeat lengths are sufficient. The inserts are mounted on quick change cassettes and give a repeat range from 12-24ins. No print pressure adjustment is needed when changing cassettes, and the web is not broken.

An interesting feature of the press is the circumferential register control system designed by Castagnoli, and currently at prototype stage. A master mark is printed on the first print station, then measured against a mark printed by each subsequent print station. Deviations outside a specified tolerance are auto-corrected. Manual lateral register adjustment is also included on the press.



Federico d'Annunzio, joint managing director at GIDUE, and Andrea Renzetti, Sales Director at Castagnoli, stand in front of an offset print unit

To enhance stability of the web, Castagnoli has implemented a closed loop tension control system with a servo driven infeed and load cells mounted on each print unit. ‘Stability is easier to achieve on this press than on a flexo press,’ says Federico d’Annunzio. ‘With the Flexo process variables can make the system unstable locally and the load cell has to react much faster. An offset system has to be stable before you can make sensible adjustments.’

Castagnoli implements its own version of the CIP3/4 standard to move inking data from the pre-press TIFF file to the motorised ink-duct system, although Litografia Fiorentina makes plates from film and inputs inking data manually.

Print results observed by L&L were equivalent to sheets printed on Litografia’s MAN Roland press. Particularly noticeable is the absence of ghosting, which Castagnoli engineers put down to the 16 rollers in the inking train. ■

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The GEW VCP-Film unit for UV curing heat sensitive substrates on presses without chill rollers

UV futures

With narrow web converters facing challenges from heat-sensitive substrates and rising energy costs, **Andy Thomas** looks at how UV lamp manufacturers are responding

UV-equipped narrow web presses – flexographic, letterpress and offset – are now the dominant label printing technology in Europe. Although the US, with its water-based flexo legacy, lags behind, more UV flexo equipped presses are being sold than ever before. To give some idea of the dominance of UV in Europe, consider that Mark Andy in the UK sold its first UV-equipped press back in 1994 – and sold its last water-base flexo press three years ago.

Today, UV label printers face a major challenge as they seek entry into the fastest growing unsupported film label markets, including shrink sleeves and reel-fed cut & stack. These materials are much more easily stretched by a combination of heat and web tension than pressure-sensitive label laminates, and the last few years have seen a major effort by manufacturers to introduce cooler running presses.

But UV curing of heat sensitive substrates remains something of a 'black art', and requires mastery of a complex list of variables including the lamp characteristics, lamp housing,

thermal/mass characteristics of the substrate, and the efficiency of chill rolls and shutters.

Managing heat

Managing heat has become the key challenge for UV system designers. Typically, the UV lamp housing is cooled by a regulated flow of air or chilled, circulating water. Some systems combine both air and water cooling. Press stoppages activate revolving or clam-shell light-tight shutters positioned above the lamp fixture to keep heat from the web.

Heat management techniques to reduce the surface temperature of the substrate include circulating de-ionised water through quartz, filter tubes or plates placed under the lamp and between the substrate. Water-cooled chill drums, or rolls, are used where thin films and packaging foils are being run. In such cases, presses with straight web paths usually have watercooled heatsinks, or undershieldings placed behind the substrate.

LED vs mercury

Will LEDs replace mercury lamps as the prime source of UV radiation in the near future? LED has key advantages: it uses very low power – an order of magnitude less than mercury; it turns on and off instantly, so there is no need for shutters; although water cooling is necessary to remove heat from the chip, heat output is just half of mercury lamps. Other advantages include upwards of 50,000 hours lamp life, consistent energy output, very low voltage/electrical consumption (a 24in linear array would use 15 volts at 14.4 amps), and scalability. They are also non-hazardous in disposal.

'Within the next two years, we will see increased power output from LED lamps,' says Clayton Sampson, joint MD at UV inkjet specialist Integration Technology. 'We are currently seeing 1 watt/sq cm, and we hope to be at five times that by the beginning of 2007. We are waiting for big investments in Japan, although most of this development is in the visible light spectrum.'

Stephen B Siegel of UV Process Supply was equally enthusiastic when reporting test results to a recent Radtech Europe meeting: 'This technology, while in its infancy, shows great promise to revolutionize the methods and effectiveness of UV curing. The very nature and size of the UV LED allows for increased flexibility, scalability and market reach.'

Stay safe

UV Light Technology Ltd has published a useful guide for assessing the level of risk arising from exposure to UV light emissions from artificial sources. Entitled 'Risk Assessment of Exposure to UV Light Emissions from Artificial Sources... a practical guide and record', the publication also provides information on appropriate control measures to minimize risks. More at www.uv-light.co.uk

Only about 45 per cent of UV energy reaches the web directly, while the remainder is reflected at an angle off the lamp reflector's surface. Therefore, much effort has gone into reflector design because of their key role in managing heat to reduce the surface temperature of the substrate. At one time reflectors were made from highly polished aluminium or stainless steel, but modern types are now more likely to have several thin dichroic layers applied to thermally-resistant glass. The idea is that the reflector reflects only UV energy while absorbing the unwanted IR energy.

A variant is to use angled 'cold' mirrors to reflect the UV

"UV curing of heat sensitive substrates remains something of a 'black art', and requires mastery of a complex list of variables"

energy to the substrate to avoid direct radiation. The IR energy passes through the mirror for removal from behind by air cooling. Recent examples of UV systems using these techniques include Uvitermo's Coldstar-SRK, an air-cooled UV-system specially designed for temperature sensitive and thin substrate applications on narrow-web presses. It can be supplied with a no-contact chain cooling system and has a UV capacity up to 200W.

So-called 'cold UV' is an area marked by controversy, however, as each heat management technique has its pros and cons.

For example 'cold' angled mirrors or water-cooled quartz tubes do indeed succeed in reducing heat. But they may also reduce curing efficiency, and so require more power. Water absorbs the UV frequencies which are critical for curing, while distance traveled by the UV radiation from lamp to mirror then down to the substrate can also lead to loss of curing power (or intensity). The balance here is between heat reduction and curing power. Thick ink films need a high intensity in order to effect a cure, and a high dose to 'close' the top surface.

Chill rolls?

Although truly 'cold' UV is not practical, there is no doubt that significant progress has been made in heat management of UV lamps. Indeed, some manufacturers now claim that chill drums can sometimes be eliminated altogether in some applications.

Of course it would be nice to eliminate chill drums. Not only do they add expense and complexity to the press – through the need for shutters, for example – but the inertia of the cylinders will be different from other cylinders in the press, and this can introduce instabilities in the web path. In addition, chill rolls increase the length of the web path, increasing waste during make-ready.

The latest manufacturer to claim success in eliminating chill rolls and shutters is Aradiant. The company's Compound Filtered UV (CFUV) system uses a radiation filtering system enclosed in a chamber placed in front of the lamp. The chamber contains liquid and solid filterants working together to absorb and then transfer the IR radiation away from the UV assembly. 'The practical result is a UV system that you can hold your hand in front of when operating,' says the company's president and technical director, Joseph T. Burgio. 'Materials as thin as 0.002in

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At a time of rising energy costs, manufacturers are pushing to reduce the energy consumption of UV systems without affecting cure strength. IST Metz, for example, has developed a new lamp module, the MBS-5, which is claimed to allow narrow web printers to replace a 200W/cm lamp with a 140W/cm lamp without affecting curing performance or printing quality.

The company's figures show typical savings on an 8-color press of €6,480 per year on a total energy expenditure of €21,600. This calculation is based on 3,000 production hours per year, a lamp length of 450mm and a power price of 0,10 Euro. The technology behind this greater efficiency is IST's URS reflector, which consists of a dichroic coating applied directly to a polished profiled aluminium housing. This eliminates the need for separate dichroic reflectors and enables reflector geometry to be optimized.

Step-less power adjustment in a range 60-140W is claimed to reduce energy consumption and operating costs by lowering standby power from 50 per cent to around 20 per cent. Lamps can then be left switched on during wash-ups, thus reducing makeready time and reducing stress on the UV lamp during ignition and standby mode. IST says this increases the average service life of the lamp to more than 2,500 production hours.

GEW has a new series of lamp heads based around its e-Brick electronic power supply, claimed to increase UV power efficiency by a minimum of 10 per cent. e-Brick is claimed to convert energy more efficiently and save approximately 1.5 pence/kW/hr. Test data suggest a typical installation of eight lamps each running 6kW can save as much as £2,592 per annum.

The e-brick powers GEW's new e-System UV curing lamp head. Interestingly, optional infra-red cassettes allow UV printers to swap to conventional inks without having to re-web the press.

In addition to the energy savings from more efficient power units, modern electronically controlled presses such as Gallus' RCS330 can be programmed to put the UV system into 'sleep' mode during makereadies, further reducing energy consumption.

(0.05mm) shrink films, and other temperature sensitive materials, such as polypropylene and polystyrene, can be run without chill rolls.'

The CFUV system is certainly more complex and expensive than reflector-based systems. Burgio argues that this is compensated by eliminating expensive modifications to the press.

GEW is another company which has worked to develop a UV curing system which does not require chill rolls on the press. Its water-cooled VCP-Film unit is designed for curing heat-sensitive filmic substrates down to 15 microns without requiring a chill roll on the press. However, it achieves this by moving the chill rolls into the lamp unit. Each VCP-FILM dryer has its own integral water cooled chill roll, which takes the place of the conventional air cooled flat heatsink. Cooling of the web is achieved by wrap-around contact with the chill roll at the point of curing, and low water temperature. The system includes a 'Cold' reflector and a shutter.

Nilpeter's Jakob Landberg remains highly skeptical about the ability of 'cold' UV to eliminate chill rolls completely. 'If you have very efficient chill rolls you don't need cold UV,' Landberg told delegates to a Labelexpo discussion panel. 'Cold UV is very hard and costly to achieve and very delicate and easy to damage. Of course, chill rolls must also be very low inertia – otherwise you will expand the substrate.'

GIDUE'S Federico d'Annunzio has recently conducted extensive testing with a new range of UV lamps, and says he detects more emphasis on bringing heat back to the substrate to assist UV curing, then dissipating that heat through more efficient chill rolls. Some heat is required to initiate the UV polymerization process – particularly in free radical UV chemistries. Inks and coatings utilizing cationic, or combination photoinitiator systems would be required for a 'cold' UV system to work properly.

A point to note here is that the simple presence of chill rolls does not guarantee the substrate will not be damaged by heat. David Pelling at AdPhos AG, owner of Eltosch, points out that it is important where you chill the substrate. 'You need to cool the substrate on the chill roll at the right moment – it's no use cooling before or after curing, which can lead to heat damage and condensation on the back side of the web. On offset presses we recommend temperature controlled rollers rather than chill rolls.' ■

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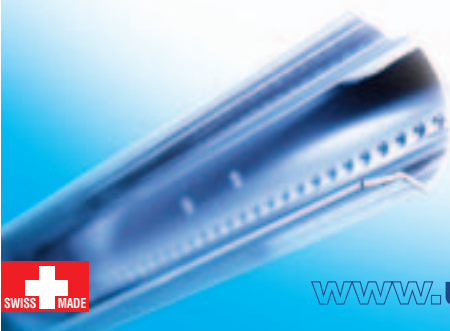
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Magnetic dies pull in US market

Gerhardt USA has big plans to invest in the Americas over the next five years. Sales of magnetic dies are booming as North and South American converters begin to see them as a crucial component in remaining competitive. **Katy Wight** reports

Gerhardt USA saw sales of flexible, magnetic dies increase by over 50 per cent last year and is predicting another big increase in 2006. A greater understanding of the benefits of flexible dies, combined with the company's strategy of reduced lead times, longer-lasting dies and a new competitive pricing structure, is rapidly attracting label converters away from conventional rotary dies. The USA has traditionally lagged far behind Europe in the uptake of flexible dies. In the past, the rotary die market in the States has been dominated by companies with massive capacity for solid rotary dies, and flexible dies were a threat to these sales volumes. Gerhardt USA president Bill Reichard explains that in Europe, roughly 80 per cent of dies are flexible and the remaining 20 per cent are solid, while the reverse is true for the US – but the magnetic market share is growing.

'In the past year we have seen a spike in sales and I think it is because converters are under so much price pressure and competition that they need to cut costs,' explains Reichard. 'There is huge potential for flexible dies in the US and everyone will move to them eventually if they want to compete. Converters are struggling to deal with the prices that their customers are willing to pay. If there are two bidders and one is using solid dies, then the company using magnetic dies will have a definite advantage.'

Gerhardt – and other flexible die manufacturers – have concentrated efforts on educating US converters about the benefits of magnetic dies. 'When we talk to converters, they often have the misconception that magnetic dies are just for short runs and they are also surprised that we can even cut thin films

on a one mil liner,' he adds.

Gerhardt has been working hard to dispel these myths and explain the theoretical benefits of magnetic dies for the correct applications. Flexible dies are less costly to manufacture and transport than solid rotary dies, they can be manufactured quickly – thus reducing lead times – and can improve changeover speeds on press.

'In terms of cost difference, a flexible, magnetic die is about 20 per cent of the cost of a solid die and simple label shapes are cheaper to produce. A 7-13' cylinder for a flexible die costs around \$1,200, but it will last a long time if cared for correctly. A magnetic die can be shipped the same day if we receive the order before 9am, whereas solid rotary dies can take two or three days to make. Magnetic cylinders, which used to take up to two weeks to manufacture, can now be shipped in two days. In the past, customers might have wanted to use flexible dies, but couldn't wait for the cylinders, so we have really improved those lead times now,' says Reichard.

'Magnetic dies can also reduce your inventory. A large label converter in the Midwest had ten solid dies of the same design that they used to rotate, and with flexible dies, we have enabled them to remove eight of those ten dies, and in turn it has freed up a lot of space for them as they just file their magnetic dies. They can also give converters another competitive edge when bidding for a job, enabling a quicker changeover between jobs. You can easily mount a new die on a cylinder when on press, as long as it has the same repeat.'

Gerhardt has been manufacturing magnetic dies in Europe for fifteen years and exploits this experience to optimize its operations in the US. The company is committed to lean manufacturing and has invested large amounts of capital in research and development in Europe – and these quality and process improvements are transferred to the US facility once they're proven. Such expertise includes consistent development of hardening and coatings to extend the lifetime of magnetic dies and Reichard claims that Gerhardt is approaching the life expectancy of a solid rotary die. The

"A magnetic die can be shipped the same day if we receive the order before 9am, whereas solid rotary dies can take two or three days to make"

CCL Label fully-flexible

CCL Label, Highstown, New Jersey, started using flexible dies three years ago and now roughly 95 per cent of its tooling is magnetic. Order engineer Richard Pullen explains why it made the switch: 'Flexible dies are a good fit for our business – short run, fast turn around. Flexible dies can be turned around quicker, are less expensive than the traditional hardened tooling and they require much less space to store.

'The initial challenge was getting press operators to accept and adjust to using flexible dies. Once they are comfortable using the flexible tooling the negative preconceptions seem to vanish. There are still a few materials which are difficult to convert with flexible tooling, however for the most part we have been very successful with a wide range of paper and film face stocks.

'When we began converting to flexible tooling, we tried several vendors and found Gerhardt to be the most responsive. They gave us the support we needed to make a smooth transition from rotary to flexible tooling.'



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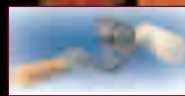
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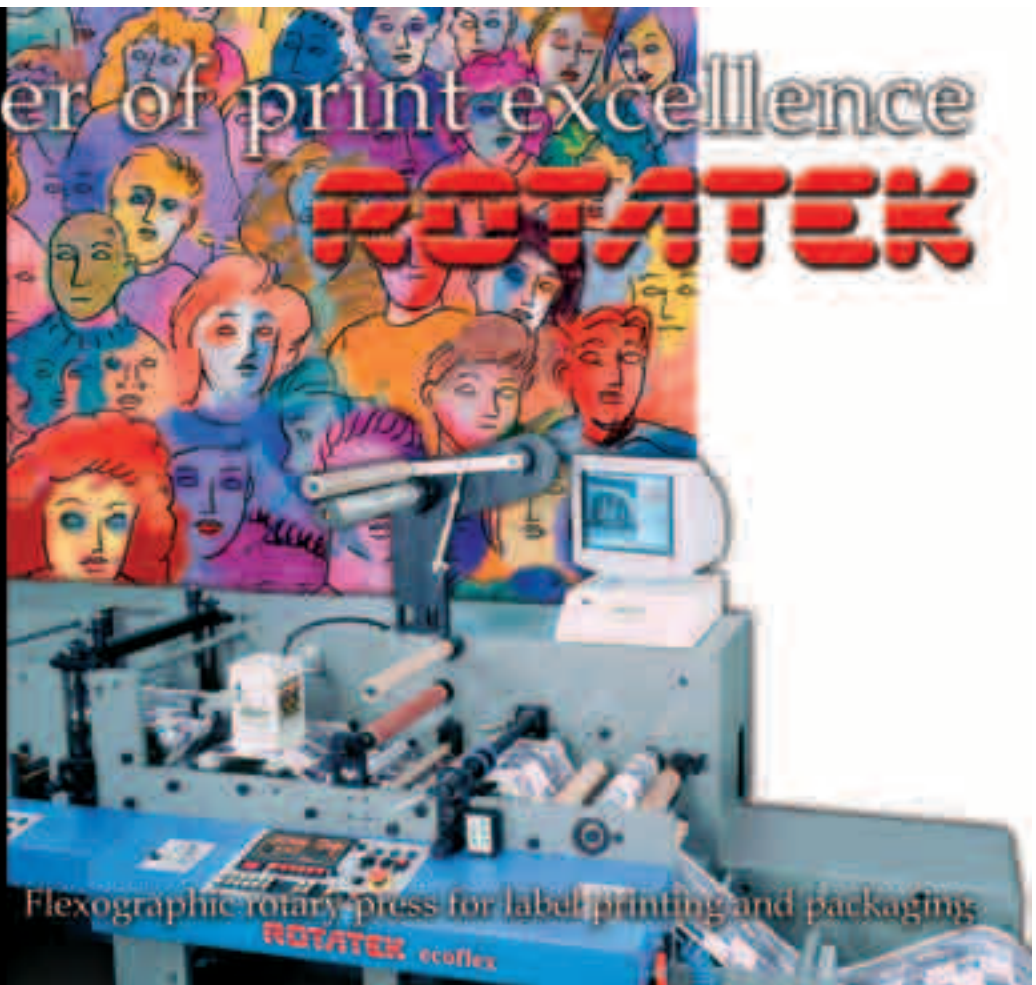
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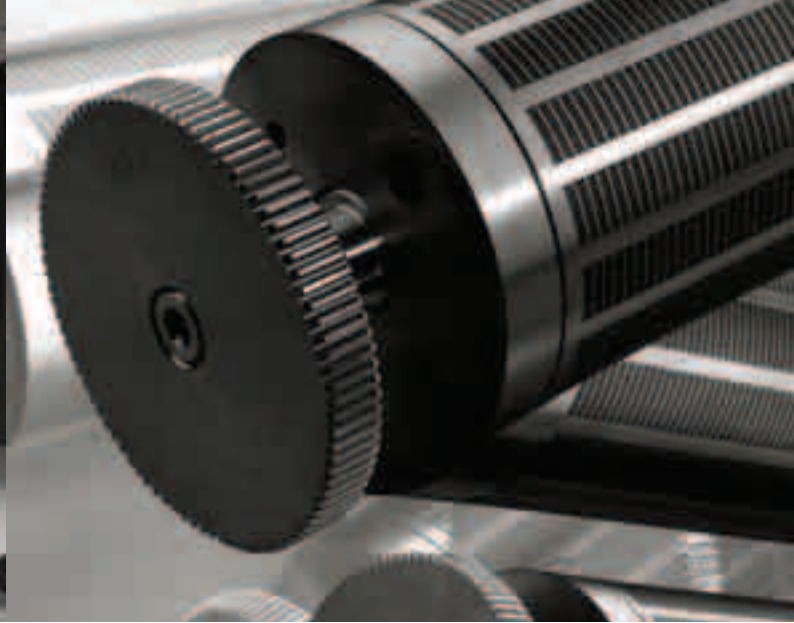


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Bill Reichard with the high-tech milling machine used to machine sharpen all the flexible dies

company is always looking to improve its service to customers and recently introduced a new competitive pricing structure and online ordering system. The new online system enables customers to order standard-shaped flexible dies 24 hours a day, 'which gives us a huge advantage on price as we're not paying for someone to sit on the phone and process the order,' explains Reichard.

Gerhardt's plant in Dallastown, Pennsylvania, manufactures dies for North, Central and South America. A lack of domestic die manufacturers in Central and South America, and the relative low cost of shipping magnetic dies has created a large market in the region.

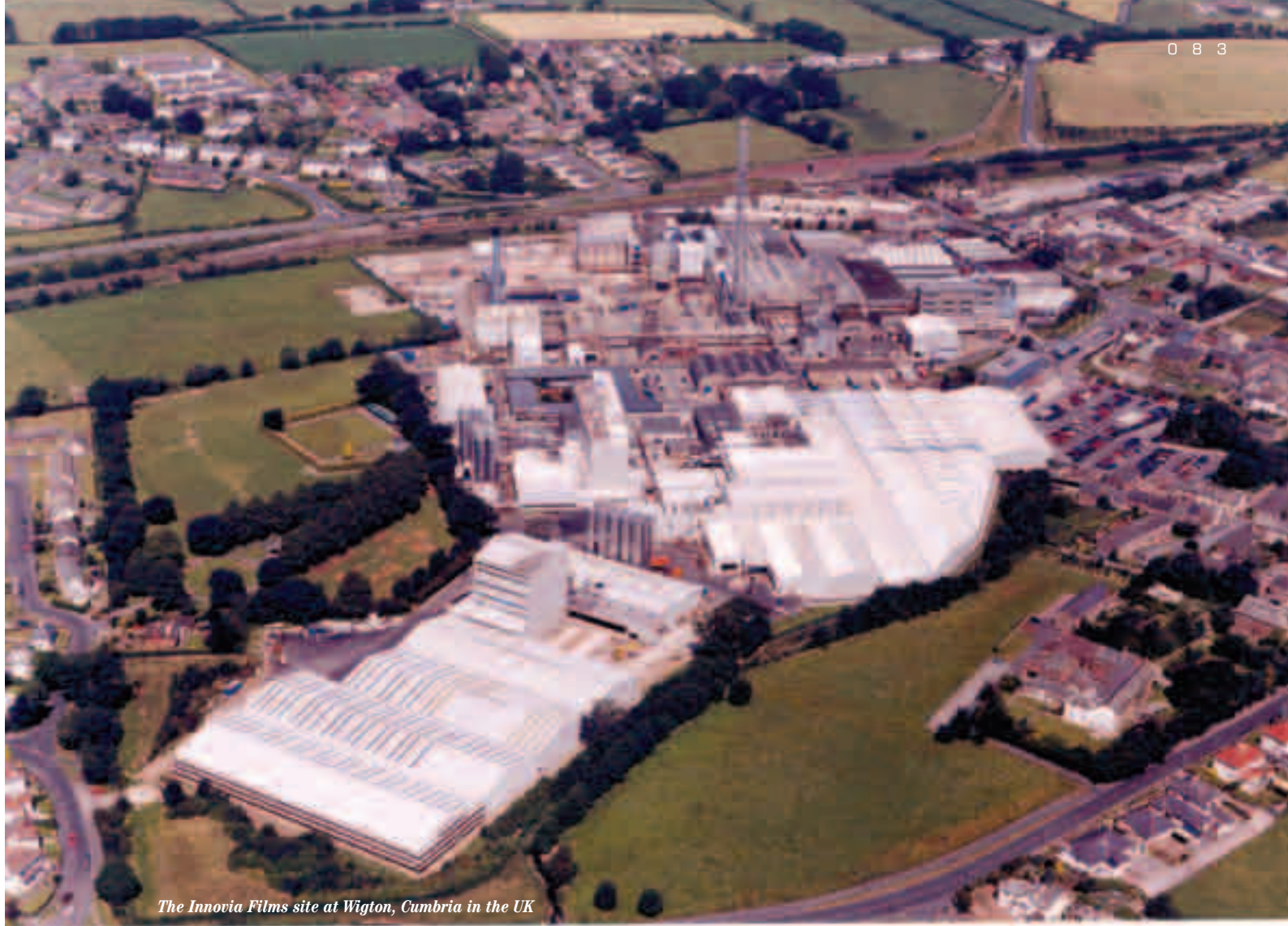
'A solid rotary die can weigh 150lbs and that is expensive to ship,' says Reichard. 'With a flexible die, you can ship it in a mailing tube because they're so light. We are expecting Brazil to be a big market in the next few years, but at the moment Argentina, Chile, Colombia and Venezuela account for about 25 per cent of sales. We sell, manufacture and service predominantly out of the US, but we opened an office in Buenos Aires at the beginning of this year to distribute our products in South America.'

The company is also working hard to establish further representation in the US. When it started manufacturing magnetic dies in Pennsylvania, the focus was on the North East, but now Gerhardt has reps in the South and Midwest, and is particularly interested in building business on the West coast.

"A solid rotary die can weigh 150lbs and that is expensive to ship. With a flexible die, you can ship it in a mailing tube because they're so light"

Flexible dies can be sent overnight from Dallastown, to any city in the US at low cost – so the location of the manufacturing plant becomes irrelevant.

Reichard says that Gerhardt's European heritage has meant that it manufactures twice as many flexible magnetic dies in the US as solid dies. 'We still do solid rotary and we always will,' he says, 'because magnetic dies are not ideal for every application. A solid rotary die may still be a better option for abrasive or particularly thick materials, although this is becoming less of a problem for magnetic dies. There is huge potential for magnetic dies in the American pressure-sensitive market. The converters are keen on the technology and they are beginning to open their eyes to the opportunity.' ■



The Innovia Films site at Wigton, Cumbria in the UK

Innovating at Innovia

Innovia Films has returned to its core expertise as a developer of specialist BOPP films following the demerger from Surface Specialties. And as **Andy Thomas** reports, there are interesting label developments too from its cellulose division

Keeping track of the constantly changing corporate landscape is getting more and more difficult as established label brands are absorbed into new entities under the pressure of global consolidation.

UCB was one such famous brand which underwent a dizzying array of ownership and name changes before settling down today as Innovia Films.

In 2003 Surface Specialties was created through the integration of UCB's Films and Chemical sectors with Solutia's resins, additives and adhesives activities. But in October 2004, the decision was taken to refocus on core capabilities, and the UCB Films business was bought out by a consortium led by chairman Dennis Mathewman and Candover Partners. The

mission was to concentrate firmly on the core packaging, overwrap and labeling films business, and the company was renamed Innovia Films.

David Beeby was appointed chief executive shortly after Innovia Films was established. Beeby brought with him a wide range of experience in the films converting sector. He had previously been vice president of Marketing and International Sales at flexible packaging specialist Alcan Packaging, where he had additional responsibility for managing global food customers. Before that he held senior management positions at film converter Smith Bros.

Beeby's priority during Innovia Films' first operational year was to disengage its many operational processes from the former



group's centralized systems. New legal entities had to be created globally and staff and equipment relocated to enable Innovia Films to function entirely as a stand-alone global company. At the same time the company faced the challenges of rising raw material and energy costs and of continuing to bring innovative new label products to market.

'The change of ownership has not altered our global focus on the labels market, which remains a key focus of our business,' states David Beeby. 'Adhesives and films overlapped in the Surface Specialties days. Today we can choose to work with other suppliers which helps widen our scope for innovation.'

Despite all the name changes, there remains continuity of key staff at Innovia Films reaching all the way back to the UCB days. Innovia Films's global sales and marketing director Labels & Graphics John Fell, for example, has worked for UCB and now Innovia for over 30 years, and global sales and marketing manager Wayne Middleton has spent 14 years dedicated to the company's labels film business.

Part of the strategy of refocusing the business is a renewed concentration on what sets Innovia apart from its competition. 'We need to focus on how we are different, with our bubble BOPP technology, coating systems and cellophane,' explains David Beeby.

Asked what are Innovia Films' key strategic research priorities, Beeby names conformable films and shrink technologies. 'We ask ourselves this question: how can we take our materials into wider areas? As an example, can we take the shrink characteristics of our over-wrap films, then dial in our labels knowledge and look at building shrink characteristics into a wider range of BOPP films?

'All materials have a memory, and it's how you delay that, that gives good print characteristics and shrinkability. We know PVC has a high level of shrink, but is hard to print, so people are looking for alternative technologies and we're actively looking at the possibilities for BOPP.'

The theme of 'dialing in' the properties of competing film products, led last year to the launch of Rayoface CZPA, a clear BOPP film with the conformability properties of PE and PVC.

'We bolted on PE and PVC squeezability with the well known advantages of BOPP in terms of clarity and performance on press during printing and die-cutting,' explains David Beeby. 'At Labelexpo we launched a White pigmented version, WZPA, which continues to expand the BOPP pie.'

Both Rayoface films are designed for applications requiring conformability on flexible containers, such as squeezable shampoo bottles, shower products and tubes.

Innovia Films had an interesting opportunity to think 'outside the box' with its regenerated cellophane product line, whose primary use is in overwrapping and confectionery packaging films. Innovia applied cellophane's natural properties of breathability to a problem which confronts BOPP in the returnable bottle market: the unsuitability of BOPP for the adhesives traditionally used in this cut & stack market and the requirement for removability of the label.

R&D Center

A significant asset which went to the newly independent Innovia Films was a dedicated R&D center, opened in 2002 at the Wigton site by British prime minister Tony Blair.

The center, which employs 50 research and development people, brings together technical research and marketing disciplines as well as housing pilot lines and a wide range of testing equipment.

'There is a major push to let end users know what can be achieved with new film technology,' remarks David Beeby. 'They often know what they don't want but not what they do want!' Beeby's favorite example is the humble coffee cup holder. 'Nobody knew they wanted coffee holders in cars before it was shown to them by car manufacturers. Now everybody wants a coffee cup holder.'

Beeby is adamant, however, that Innovia Films will not simply bypass converters and sell direct to their customers. 'One of the key functions of the R&D center is to support converters' product development to the stage where they don't have to dedicate too much machine time to trialling.'

Another focus of the R&D center is to look at how labels can help exploit new container technologies.



(Left-Right) Wayne Middleton, global sales and marketing manager, David Beeby, chief executive, John Fell, global sales and marketing director, Labels and Graphics, at Innovia Films

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Innovia Films' R&D center, opened by British Prime minister Tony Blair in 2002

The product now under development is a clear film designed to approximate a 'clear-on-clear' look, while fitting into a wet glue (cut & stack) workflow. The semi-permeable nature of cellulose allows adhesives to dry out completely, avoiding problems with bubble formation – water passes through the label, allowing the adhesive to dry in the normal manner. Similarly, since the face material can be penetrated by water, adhesives are removable in a caustic bath.

In terms of handling, cellulose is a non-static material which is claimed to print and die cut in a manner similar to paper and to dispense on standard paper label applicators.

It will be interesting to see what success this product has in a market dominated by heavy investment in traditional cut & stack machinery, but which is increasingly interested in product differentiation using clear film technology.

Innovia is also promoting clear BOPP patch labels as an alternative to roll-fed clear-on-clear labels. The concept is to provide a clear label but without the CAPEX requirement of reel fed PS application machinery.

At the same time as pushing through these innovations, Innovia Films is continuing to enhance its more traditional products for the booming variable information printing (VIP) sector, with a focus on increasing yield, printability and environmental resistance.

At Labelexpo the company launched Rayoface VTT, a high yield, top-coated white facestock film designed primarily for use in the industrial, chemical, logistics and transport labeling markets and for labeling outdoor garden and DIY products. Available in 70 micron gauge, the film is claimed to offer up to 20 per cent increased yield over comparative materials, making it a

replacement for paper labels in applications requiring a high degree of resistance to moisture, oil, and chemicals. UV stabilization of both the BOPP base film and the paper-like topcoat is claimed to ensure an outdoor service life of up to two years. The topcoat is printable across a wide range of traditional print processes and for variable information printing (VIP) by thermal transfer or dot matrix printing.

David Beeby says Innovia Films is keeping a 'watching brief' on other 'hot' topics which get picked up by the packaging press. Thinner films, for example:

'Thinner films are always a subject for product development. Technically we can manufacture a lower gauge face films, but dispensing them it is a challenge. Although the converter saves on materials costs, the total supply chain cost, including the cost of adapting the applicator machinery, might be far more.

What about building security properties into Innovia's films for brand protection purposes? The last time L&L visited the Wigton site (then UCB Films), the company was in the process of setting up a division to leverage the security technology developed by its banknote division into labels applications.

'Lots of people in the packaging chain want to talk about it, but is there a real demand for complex security solutions?' asks David Beeby. 'We are still looking at multi-layer security technologies, and also forensic technologies, but it is not the prime focus it was three years ago.'

As for RFID, Beeby does not see any additional value proposition for Innovia Films in becoming a supplier of films with pre-inserted chip/antenna assemblies. In-mould labels is another area where the company is examining market developments but is not committing significant resources. ■



FINAT bites back

FINAT is seeking to reverse a decline in membership and pursue strategic initiatives to promote pressure-sensitive technology.

Andy Thomas interviews FINAT president David Harrison and managing director Jules Lejeune

When Skanem's Multinational Sales Director David Harrison became president of FINAT in June 2005, he announced a two year strategy designed to invigorate the organization and give it a roadmap for future growth and development.

A series of task forces were formed to address the implementation of these strategic goals, and today significant progress has been made with the support of a very pro-active FINAT Board.

FINAT membership had been in decline for some time, and Harrison's first priority was to rebuild it. 'We focussed on grass roots issues, starting with direct member benefits, and have negotiated some attractive member discounts for third party products and services.' New member benefits include reduced cost entry into Label Expos, Tarsus global Label Summits, the Encyclopedia of Labels & Labeling Technology, and Labels & Labeling subscriptions. Deals with other media and conference providers to establish exclusive discounts on their studies and conferences are currently under discussion.

To encourage smaller converters and suppliers to join FINAT, membership fees now more closely reflect the size of the companies involved. 'The largest multi-national label converting groups now pay appreciably more than the small-to-medium sized companies which make up the majority of the European label converting industry,' says Harrison.

The role of the Converter committee is also changing under the chairmanship of Joachim Dudzik, who succeeded Helmut Schreiner. 'The committee should develop into a platform discussing trends and developments relevant to small and medium-sized label businesses,' says Harrison.

FINAT's recruitment strategy appears to be working. Recent new members include converters Allstat in the UK, Altriflabel in the Netherlands; The Ben Franklin Press & Label Co, USA; Egyptian Paper Converting, Egypt; Euroadhesiv, Italy; Komark International, Malaysia; Securikett, Austria; Starpack, and Logo Etiketten, Germany. New supplier members include Codimag (France), Flexcoat Produtos Auto-Adesivos, in Brasil;

Frimpeks, Turkey; Havannah Paper, New Zealand, M-real Zanders in Germany.

Under Harrison FINAT is also looking to expand its membership into Eastern Europe and other emerging markets. This has long been a concern for Jules Lejeune, whose company has run the FINAT secretariat for many years, originally under Jules' father Mans.

'Eastern European countries are now making rapid progress in catching up with conditions and the lifestyle of the West, and this is presenting one of the greatest opportunities for expansion for self-adhesive label makers,' says Lejeune. 'FINAT has a great role to play in promoting mutual co-operation and partnership between both regions.'

David Harrison agrees that Eastern Europe is all too often seen as a threat – and not an opportunity – for printers in

Future challenges

David Harrison picks out key challenges for FINAT to tackle in the future:

- As the consumer is offered more choice, product diversification increases, and label run lengths decrease. Set up times on our printing presses becomes more critical, and suppliers will need to respond
- We cannot expect to continue to grow our market with our customers if we do not address the waste management issue properly. Therefore we must find a cost effective way to re-use or recycle the liner, or adopt innovative solutions substantially reducing our secondary materials volume
- The oil price situation will challenge us with rising materials costs
- We need to understand how FINAT can help its members in a range of issues including material quality versus cost reduction, energy efficiency of equipment, sub-contracting of label procurement, recruitment of operators, digital printing and benchmarking

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Western Europe: 'But there are huge opportunities in the East. In 2004, the use of self-adhesive labels grew, overall, by 4.9 per cent. In Eastern Europe it grew by a massive 19 per cent and shows no signs of wavering.' FINAT recently released a report examining label trends in 2005 which confirms these trends.

'The opportunity for label printers in the West is to establish subsidiary or satellite printing plants in Central or Eastern Europe, either directly or by establishing east-west partnerships – and this is a trend that may develop strongly in the coming years,' says David Harrison.

Supporting the increased emphasis on converters and new market opportunities, FINAT's new Congress Programme Committee, chaired by Jakob Landberg of Nilpeter, has introduced more 'converter success stories', while focussing on the potential of the enlarged Europe.

FINAT is also looking to bring European and Indian label converters together. In December, in co-operation with VSKE and LMAI (Label Manufacturers Association of India) and supported by the Euro-Asia Invest programme, FINAT is organizing an industry match-making event bringing together European and 30-50 Indian small and medium sized companies.

'The aim of this project is to establish long term contacts between European and Indian SME member companies,' says Jules Lejeune, 'to know more about the Indian and European Labelmarket, the business culture in India and Europe, the challenges and prerequisites to set up a business. In short to bring Europe and India closer together.' The event is especially aimed at smaller companies that usually do not have access to the network of international companies but that represent a significant part of the labeling market, both in Europe and India.

PSA champions

An issue which FINAT will have to face – as the champion of the self-adhesive industry – is the growing useage of shrink sleeve labels by its member companies. Although growing from a small base, shrink sleeve labels are growing at rates up to 17 per cent in Western Europe.

'This is an issue which will need to be tackled, but the main thrust of FINAT's promotion of pressure-sensitive labels is directed against direct print or in-mould labels where the decoration is applied at the point when the container is manufactured,' says Harrison. 'Here we can promote the flexibility of self-adhesive labels in terms of reducing redundant stock holding and generating big savings by just-in-time delivery to the packing/filling plant. The more we can do to promote this type of thinking among our customers, the more opportunities for expansion of our sector of the industry will arise.'

Harrison believes that end users are not always aware of what can be achieved using the latest in-line self-adhesive technology. 'We need to ask, how can we create a better mutual

understanding between the label industry and its customers about the relative merits of self-adhesive in relation to the customers performance requirements?' Currently, FINAT is in the process of completing the program for the first of a series of end user focussed workshops, to be held at the end of November in Amsterdam.

Harrison sees FINAT's Technical Handbook – The 7th Edition of this 20-year old work was published in December – as having a key function, both in establishing benchmarks for label performance, and in helping create a common language for label buyers and converters globally. Interestingly, the 7th edition will also be published in business Chinese. Harrison particularly praises the work done by Jacques Lechat of ExxonMobil Chemical, who was sub-committee Chairman for test method development.

A key role of trade associations is representing their industry to legislators, and FINAT has a liaison officer with the European Union in Brussels. FINAT has a particular interest in the development of environmental legislation, and remains worried about any moves to class release liners as packaging waste, which would carry a recycling/recovery levy. Today release liner is classified as industrial process waste in all EU countries except the UK.

Jules Lejeune has focused the FINAT Board's attention on the issue of recovery and recycling of release liners, matrix and set-up materials as a strategic priority. 'We are planning to increase our efforts to promote the development of recycling solutions and to set up pilot projects in selected target countries this year.'

For the future, FINAT will remain a key sponsor of Labelexpo Europe. Both David Harrison and Jules Lejeune were delighted with the success of the last show in Brussels, which attracted well over 20,000 visitors and saw €350 million worth of business transacted. 'As co-sponsor of the show, FINAT was proud to establish that 50 per cent of the exhibition floor space was occupied by FINAT member companies,' says Harrison. ■

David Harrison, multi national sales director, Skanem and Jules Lejeune, managing director, Finat



Indian Update

There are just a handful of Indian label printers who can afford to invest in the most modern Western press technology, and Update Prints India in New Delhi is one of them. **Andy Thomas** reports on the company's machinery strategy and impressive customer base

Uppdate Prints is one of India's premier label printers, servicing some of the biggest Indian and global end users in the pharmaceutical, cosmetics and automotive markets.

Update is now in its third generation of family ownership. It was founded in Kobe, Japan in 1924 by the present managing director Rajesh Chadha's grandfather, originally producing transfer labels. Chadha senior came back from Japan, took his machines with him, and set up the company up again in Rawalpindi, in present day Pakistan. He lost his business once again during the Partition of India which followed the end of British rule and started the business for a third time in New Delhi, this time from scratch, in 1948.

Rajesh Chadha's father Mr T.R Chadha built the business during through the 1950s and 1960s on the basis of innovation – he was the first to bring holographic labels to the Indian automotive and bicycle industry, for example.



Before joining the family business, Rajesh spent nine months in the US observing the new pressure-sensitive technology, and in the mid-1970s he moved Update Labels into screen printing of pressure sensitive labels. 'It's always been up to people like us to take big steps and other people will follow,' he comments. In 1987 he was joined by his younger brother Ravi Chadha who again came from US after getting hands-on printing experience in an established US printing company. Today Ravi is the works director works and heads the production department of the company.

Rajesh is a major figure in the New Delhi hub of the Indian labels industry, and Update's high print and converting standards have been recognized by numerous LMAI trophies as well as the Udyog Patra award – a national award given to self-made industrialists.

Rajesh is also active in his local community as vice president of the Naraina Small Industries Welfare Association.

Update Labels has consistently been in the forefront of the Indian labels industry, importing the latest Western machinery. Installing Western equipment is an expensive business in India due to the very high import duties, and all the company's investments have been self-financed. Today that duty has dropped from a punishing 60 per cent to 40 per cent, with further reductions to come, but it still means only a handful of Indian label printers can afford state-of-the-art Western machines.

Rajesh would certainly consider buying an Indian manufactured press, but they are, 'not yet good enough. We would consider buying cheaper Chinese machines, but are worried about the after-sales service.'

In 1993 Rajesh bought a 4-color Focus UV letterpress machine - the first UV press in India. This was followed in 1995 by a Newfoil hot stamping press and in 1996 an Orthotec 7-color UV letterpress. A second, bigger Newfoil machine, and a second Orthotec machine with the same specifications followed in 1999.

All the presses were installed in an air-conditioned hall to ensure consistent drying – another first in India.

‘Our strategy was to have two Newfoil and Orthotec machines to give us redundancy and back-up in the event of one press going down,’ notes Rajesh. ‘This keeps the big end users interested in working with us, because we can guarantee uninterrupted production.’

The machines are tightly integrated, with the Newfoils capable of registered two-color hot foil stamping over rolls printed on the letterpresses and flexo presses, registering to a mark printed on the black station.

Today, Update Print’s tradition of innovation is upheld by Rajesh’s son, Aditya Chadha. He completed his MBA from the US and upheld the family tradition of working abroad for a few years before joining the family business. Now marketing director at Update, Aditya’s efforts helped the company diversify into the cosmetics and pharmaceutical industry, which is currently growing at a rapid pace.

‘Added value cosmetics is a huge market in India and we have had the advantage of applying the decorative skills learnt in the automotive sector in this market as well,’ notes Aditya. Indian cosmetics brands are upping their product decoration game in response to competition from global multinationals like Revlon, oriflame, Avon and L’oreal, and Update Prints has an in-house department which can offer design and visualization services to these companies if required. ‘Some Indian companies will just say that they want something close to what they see existing in the market,’ comments Aditya.

Update introduced UV flexography two years ago with the installation of a Rotatek press. The Rotatek press line includes a Stork Compact RSI rotary screen system unit for combination printing, hot foil stamping, slitting and sheeting where necessary, and is equipped with a Re web tension system, Teknek web cleaner, BST inspection system and Heaford plate moulder. The press has a second pass option. Update makes its own letterpress and flexo plates.

Update Prints still runs its screen labels printing operation in a separate plant employing 100 people. The key end use market for screen labels is the automotive and motorbike sectors, where high opacity and toughness are key requirements.

While Update Prints sources its ‘commodity’ label stocks such as high volume papers from Indian manufacturers like Avery Dennison, Weldon Celloplast and Taiwanese suppliers, in the cosmetics field the company has to rely on Raflatac and Avery Dennison for specialist labeling films. Bausch & Lomb, for example, specifies Avery Dennison Primax film for its contact lens solution labels.

Avery Dennison has manufacturing facilities in India, and Rajesh Chadha would like to see others set up operations in

“Added value cosmetics is a huge market in India and we have had the advantage of applying the decorative skills learnt in the automotive sector in this market”



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India to avoid import duties on label stocks. In fact, the duties on imports will be cut after March 2006. All imports – and specially from countries like Thailand, where India has signed a trade agreement – would attract import duties of just 16 per cent plus freight, which can be claimed back from the Indian government.

Update's other international suppliers include Electro-Optic and Gerhardt for dies. Ink matching is carried out off-line to ensure consistency between repeat jobs, with Sicpa and Arets Graphics being the main suppliers.

To help meet the cost of imported equipment and consumables, Update has become a very lean operation. For example, the company aims to hold no stock, producing everything just-in-time.

Following Update's diversification into servicing global pharmaceutical brand owners, two years ago the company installed a state-of-the-art Flytec 100 per cent inspection system mounted on an Omega SR330 rewinder supplied by ABG – the first in India. Today the Flytec is a critical part of Update's pharma inspection workflow, with labels sequentially numbered on the reverse face with an inkjet head. 'The Flytec definitely gives us an edge in Indian market,' comments Aditya.

What about the future business outlook? Rajesh and Aditya Chadha have noted increasing competition in the Indian labels sector. 'Five years ago profits were good, but now with more players, so more competition in the market, profits are decreasing,' notes Rajesh. Overall, however, they are optimistic about the future.

PVC shrink labels, for example, were initially seen as a big threat to Update's cosmetics business, at half the price of clear-on-clear PS labels. 'But now with the environmental movement becoming stronger, PVC is under pressure, as is solvent gravure printing, meaning clear PS film has made a comeback,' says Rajesh. 'Today we have good orders from companies like Revlon and others who refuse to use PVC and are prepared to pay that premium.'

Update Print's experience in dealing with global pharma brands will be very valuable when Western retailers move into India over the next five years. For Western companies looking to operate in India, Update Print's accreditation to ISO 9000 and the ISO 14001 environmental standards will be very important. 'We are waiting for Wal*Mart,' says Aditya Chadha. 'When they come we will have to work to global specifications, although it will take ten years until we have a retail market like that of Western countries.'

Noting what has happened in the West with RFID, Rajesh has been assessing RFID and asking whether Update should invest in the technology. 'RFID is not a big investment, and handling the technology is not a problem. But is there a premium?' he asks. ■



(Left-right) Aditya Chadha, director, Marketing; Rajesh Chadha, managing director; Ravi Chadha, director, Works



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Unique applications and niche solutions



Mike Fairley visits a specialist self-adhesive and in-mold label converter in Mumbai to review its success in the Indian and international export markets and to talk to company director, Manish Desai

‘Enterprise creates change – and change leads to developments.’ Such is the philosophy of Indian self-adhesive label converter, Mudrika Labels Pvt. Ltd. of Malad, Mumbai, which recognizes the value of enterprise through the principles of innovation, insight, instinct and planned effort.

Certainly such a philosophy seems to have worked well. Founded in 1996 with just a manual sheet-fed sticker-making machine, Mudrika now operates three Ko-Pack roll-label presses – two six-color and one seven color – Orthotac hot-foil stamping machine, two jumbo roll slitters, Domino coding equipment, three AB Graphic Machinery inspection rewind machines, origination equipment and a plate mounting machine.

It is also the agent for molding machines and has been instrumental in developing both the blow and injection in-mold label market in India for the past seven years, particularly for injection moulded items such as cups, plates and utensils using Yupo synthetic paper materials. Family subsidiary companies have three adhesive coating machines for labelstock manufacture, as well as Heidelberg presses for sheet-fed self-adhesive label production and cartons.

Such has been the company’s success in the relatively short time since installing its first Ko-Pack machine in 1997, that it now produces quality labels (they are an ISO 9001:2000 certified company) for global brand owners in the consumer products, cosmetics, spirits (whisky and brandy), oil, pharmaceutical and pesticides sectors, and exports finished labels to countries that

include Nigeria, Ghana, Uganda, Kenya, Tanzania, Yemen, Bangladesh, Sri Lanka, and Saudi Arabia.

Service and quality have been key to the company’s rapid growth, both in India and externally. In future, exports will additionally be targeted at the world’s developed markets, where Mudrika feel that they can provide both quality and cost-efficient performance – even allowing for exporting costs.

Today, exports already account for some 35 per cent of the company’s total label production – production which takes place 24 hours-a-day, for six days a week on a 3-shift basis. Run lengths for label jobs may frequently be as high as 100,000 (hair oil products), 400,000 (health & beauty labels) and even up to 600,000 labels; the later being large format labels produced for a pesticides company. Lamination is carried out for specific customers that need the additional product protection or image.

Computerized costing and estimating enables efficiency, accuracy and reliability when dealing with customers. To support the whole label manufacturing operation they also sell label applicator equipment to customers.

As part of the company’s philosophy they spend a lot of time and effort in developing products so as to create new unique applications and niche solutions that can then be successfully marketed with little competition. ‘Our aim is to never try and compete with other label converters’ says director Manish Desai, ‘but to look at creating new markets – and achieve better margins’. Turn-around of jobs is normally within seven days, but



'Our aim is to never try and compete with other label converters' says director Manish Desai

can be as little as three-to-four days if required by the customer. All jobs are normally machine proofed on press, with the customer signing off the proof before printing.

To continue to meet the company's growth – both in India and externally – Mudrika is already working on the building of a new factory on the outskirts of Mumbai. The group is also involved in manufacturing sheetfed commercial printing & corrugated converting plant headed by his elder brothers. The new factory will total some 30,000 square feet – of which 16,000 square feet will be for label production (up from the current 5,000 square feet label facility).

The new factory will include additional label presses and will fully operate to international quality and performance standards. Here, Manish plans to target global brand owners looking for quality production in India; to support the growth of key supermarket groups that are now looking to move into India; as well as further developing the company's extensive and growing export business. Sales, marketing and accounts will, however, remain in Mumbai at the existing offices.

To support the move of production facilities to the outskirts of Mumbai the company will provide housing, food and facilities for all the key workers they wish to retain. All operators are trained in-house as new machines are installed. Manish himself attends training courses run by the press and equipment manufacturers and then comes back and trains the operators personally in-house.

Between them, the directors of Mudrika Labels have some 25 years of experience in the label industry, growing the business from a very modest base with a simple manually operated press to a modern label business with high-tech presses that incorporate UV printing, laminating, punching, foiling, rotary

die cutting and slitting. They also operate four Heidelberg presses for the production of sheet-fed self-adhesive stickers, labels and cartons. Although using roll-to-roll label presses, some 20 per cent of production is also for roll-to-sheet products.

A wide range of labelstock materials are converted, and not just paper labels. Film label converting is an important area for the company, with labels printed on materials which include PVC, BOPP, PP, polyester and metallized materials. All output is approved for precise application or dispensing on a range of indigenous or imported labeling machinery.

Finding new customers and accounts is achieved through exhibiting at packaging shows, through finding packaging company heads responsible for specifying and buying, and through visiting different companies and cities. One city for example, may be targeted for one month at a time.

'Apart from our growing export business' says Manish 'we still believe there is good growth to be obtained in India, partly from converting wet-glue applied label users to the benefits of self-adhesives, and partly from finding new niche products and the servicing of global brands moving into the country.

If the company's growth to date is anything to go by, then Mudrika labels can look forward to a continuing and exciting future. As members of the India Label Association they also look forward to helping to grow and promote the whole self-adhesive market in India. Manish knows what he wants to achieve and has a clear idea of the route to get there. Once established in the new factory, and with additional presses, Mudrika labels certainly expect to be one of India's leading label converters. There seems little doubt that they will achieve that aim in the near future. ■

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Smart leap forward

As smart label innovator Timestrip ties up a deal with a North American homeware group, **James Quirk** reports on the latest in a line of real world applications from the company

Timestrip's recent deal with North American kitchen and home health appliances group Hamilton Beach/Proctor Silex looks to be an important step forward for the Hertfordshire, UK-based company. The agreement will see Timestrip's smart labels integrate into the Hamilton Beach/Proctor Silex range of True Air products, such as purifiers, to remind users to replace their filters within the recommended time, typically every 3-4 months.

The first True Air products featuring Timestrip's labels will go on sale in 2006, and will be sold into major store chains like Wal-Mart and Home Depot. Joint CEO and co-founder of Timestrip Reuben Isbitsky is excited by the deal: 'This is an important breakthrough for our technology in North America. Our association with a household name such as Hamilton Beach/Proctor Silex not only enhances our credibility in the market place but also gives high visibility to our brand at retail level and fantastic exposure in households across North America.'

Consumer products such as the True Air range are just the latest in a seemingly unlimited list of potential uses for the technology that was launched in July 2003. While the food and pharmaceutical industries were the initial targets, Reuben Isbitsky says that new ideas are being developed all the time. 'Every time someone comes into the office they come up with a sector that we hadn't thought of. We thought of the cosmetics industry only this year, after reading the newspaper and learning about a new EU regulation stating that every product that needs to be disposed of within three years must have a warning label.'

Food processors are looking to smart labels as a means of communicating more information about nutrition and shelf life to consumers. Given the increasing emphasis on food safety in the market, shelf life is a big concern. 'We are giving you a tool to monitor the safety and quality of your food,' says Tristan Allen, Timestrip's business development director. They are finding, however, that some consumer habits are hard to change. 'We don't target milk,' says Isbitsky, 'because whatever you do, people will always smell it – out of habit. Products like orange juice have

to be tasted, otherwise you can't tell if it's off'

The popularity of the Timestrip can be accredited to the fact that almost everyone who owns a fridge has had to throw food away after having it open for too long. The genius of the idea lies in its simplicity: 'Everyone can understand the technology,' agrees Isbitsky. 'We've only found one person who didn't – a very rich man who had obviously never used his kitchen himself. We gave some Timestrips to his wife, and she convinced him!'

'It's a non-conflicting technology,' he continues. 'The consumers like it because they are protecting themselves. The brand owners are happy because they will sell more products: everyone has a bottle of ketchup that has been in a cupboard for ages with no idea when it's gone off. And the health groups are happy because of the safety aspect.'

Timestrip's smart labels contain a liquid that diffuses through the label, enabling users of perishable food and other products to monitor for how long an item has been open or in use. The technology can be used as an external label or can be fully





Don't believe the fairytale about solid dies and long runs



Joint CEOs and founders of Timestrip, Paul Freedman and Reuben Isbitsky

integrated into products and product packaging. This is Timestrip's ultimate aim, reflected in their deals with Hamilton Beach/Proctor Silex, Germany-based packaging company Crown Zeller, and Nestlé. 'Ultimately we want Timestrips integrated into the supply chain,' confirms Isbitsky. 'We want to be like Intel Inside: not market-specific, we just want to concentrate on Timestrip – for everything.'

Following from food, consumer products are an obvious choice. 'The speed is an advantage,' says Isbitsky. 'The medical industry is very slow, for example, and big food lines also take time. But in the consumer market innovation is key, and new products are rolled out every year. Profit doesn't change amongst different markets. The key is to have success in diverse areas.'

The idea for Timestrip was born while Isbitsky was project manager at Britta. 'People were meant to change their water filters every two months, but our research showed that on average people were only doing it twice a year,' he says. 'There was a massive opportunity to generate guaranteed income, if I could come up with a single-use, cheap timer to remind customers when to change their filters.'

Fortunately for the more disorganized of us, he did. ■



(Above and left) Timestrip is looking for different ways to integrate the technology into packaging

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Topflight RFID in full throttle

Topflight is one of the few North American converters that has implemented a profitable RFID label program. What's their secret?

Katy Wight reports



“RFID does not just mean bringing a piece of equipment in and it is not just attaching inlays – you have to be able to document and control all of the procedures”

Topflight Corporation of Glen Rock, Pennsylvania, has manufactured and shipped 20 million RFID tags over the past two years. While the majority of converters in the US are sitting back, waiting to see how RFID label converting technology evolves, Topflight is already cashing in. A small number of converters in North America are dominating the RFID landscape, developing the converting technology and building up experience to help manufacturers

meet retailer mandates – and it looks set to stay that way.

Topflight president Mike Falco has worked for the privately-owned company for five years. The facility has 160 employees and Falco explains that it has seen organic growth of around ten per cent



Hot stuff - Kocher + Beck hot stamping cylinders



Topflight has branded its RFID tags as part of the RFID Easy program

over the last few years. Topflight was founded during the Second World War, to supply small label converting machines to aircraft manufacturers. After the war, the company diversified and began printing labels itself. The company has grown over the years and today has operations in Switzerland, Italy, Sweden, Australia, Colombia and Venezuela. Topflight has also spun-off two related companies – Adhesives Research, a company which coats specialty pressure sensitive adhesives particularly for the medical field; and Conductive Technologies, which concentrates on membrane switches and bio-sensors – both of which give you an idea of the specialization and technical depth that has been fostered within the company.

Topflight is concentrated in four vertical markets today: durable consumer; HBA and cosmetics; medical and pharmaceutical; and electronics. Falco believes that the company was able to draw experience from these markets and use it to develop an RFID program.

'Our work in the medical and pharmaceutical industry is not just labels,' says Falco. 'We actually work with the functional materials that go into devices and you need carefully

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Lean experience

‘We are really well positioned for the future,’ says Falco. ‘We are going to place more of an emphasis on lean manufacturing, more inventory management and catering to short runs. Structurally we have made changes so that we can facilitate that.’

Falco’s interest in lean manufacturing was sparked by fellow converter Art Yerecic, of Yerecic Label, New Kensington, PA. They met through TLMI and despite being less than four hours apart, when they realized that they did not compete, they began to share experiences. Yerecic Label was further along in its lean implementation and Falco made benchmarking visits to its plant and then hired a lean consultant. Using the Theory of Constraints, Topflight worked out where its own bottlenecks were occurring and began a lean program in the shipping department.

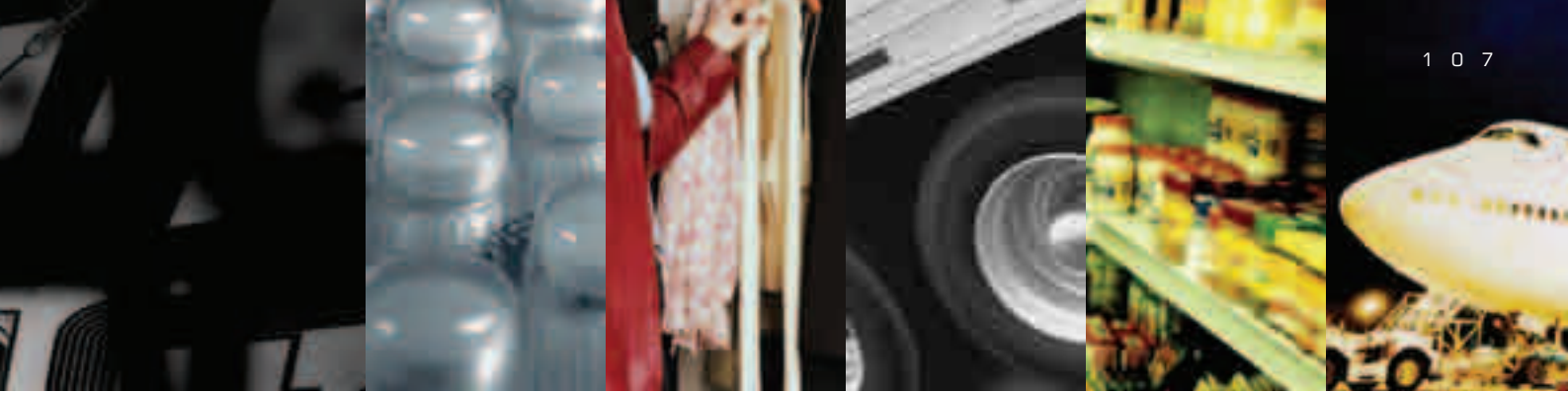
‘We started in shipping and saw significant results. We have been running the program for about 18 months now and we have even been awarded state money for training,’ Falco says.

‘We realize the importance of becoming a learning organization within a continuous improvement environment, as this leads to understanding. You have to understand that to continuously improve, you have to learn. We have put staff together who embrace learning and CI – these core values can’t help but make you successful.’

“The Wal-Mart mandate has forced end-users into areas that they’re not necessarily comfortable with and they’re having to hire people and learn all about it”

controlled quality, documentation and current good manufacturing processes (cGMP). Being in the medical and pharma industry has helped us to implement our RFID program. You have to have a good technical support group to get into the market and we already have established engineering and R&D groups because of the level of development needed for many of our medical applications. RFID does not just mean bringing a piece of equipment in and it is not just attaching inlays – you have to be able to document and control all of the procedures.’

Topflight began implementing the RFID project two and a half years ago when it was approached by inlay manufacturer Alien Technology. Alien is famed for its patented manufacturing process, Fluidic Self Assembly (FSA), which inserts integrated circuits (ICs) or chips into EPC-compliant RFID inlays in high volumes. A frontrunner in the race to get EPC RFID labels adopted, Alien needed to be able to provide finished



President Mike Falco has been with Topflight for five years

converted labels and approached Topflight to be its proprietary in-house converter at that time. Topflight developed its own equipment to insert and laminate RFID inlays into pressure-sensitive labels, which it viewed as less expensive than investing in existing OEM machinery.

‘We were one of the early adopters, which meant that we got to work with other early adopters, like Gillette. We were making money out of the gate, but the technology is changing so fast that you need to be very flexible,’ says Falco. He has built a dedicated support team for their RFID business, which includes an RFID manager within the marketing group, who knows all of the inlay manufacturers, integrators and thermal transfer printer/encoder manufacturers, as well as an R&D specialist to answer technical questions.

‘We have invested in the infrastructure and we feel comfortable,’ Falco adds. ‘We are able to advise customers on broader aspects of RFID implementation, such as integration. The Wal-Mart mandate has forced end-users into areas that they’re not necessarily comfortable with and they’re having to hire people and learn all about it. In an emerging market, if you can find a supplier that will help to guide you through that minefield, then that is really valuable – and that is what we aim

“Our customers are demanding 100 per cent good labels and that requires a lot of processing. First off, we’re not getting 100 per cent good inlays from our suppliers”

to be. Topflight is an industry expert now and we are able to make recommendations. End users don’t have to go through a learning curve with us. In fact, Topflight has branded this approach to the market, calling it RFID Easy – “The clear and easy way for RFID labeling”.

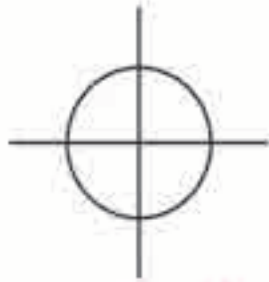
The learning curve may be short with Topflight, but Falco is honest about the challenges they continue to face. The industry is preoccupied with high unit costs and tag failure rates – and Topflight’s feeling the pressure.

‘One of the biggest challenges is getting 100 per cent good product to our customers at a reasonable price point. It doesn’t take much to deactivate a tag and make it dormant. It is possible for us to get 100 per cent out of the door, but at the moment we’re not at the price point we want,’ he says.

‘Our customers are demanding 100 per cent good labels and that requires a lot of processing. First off, we’re not getting 100 per cent good inlays from our suppliers. We work with many inlay suppliers and there are differences in terms of quality. All of the suppliers are marking the defects now, but they need replacing on the roll and that adds a lot to the base price. Some of the RFID converting machine manufacturers say that you can get into RFID for a reasonable price with an entry-level machine, but when you take into account that you are going to need the ability to replace the bad inlays, you are going to need a more expensive and a more sophisticated piece of machinery.

‘The biggest benefit of being an early adopter is that we are further down this learning curve and that is helpful. We won’t suddenly have to jump on the bandwagon. We have learned a lot – a lot of good and a lot of bad,’ he says. ‘I believe that for now RFID will continue to be dominated by a small number of key converters in the US. It is a significant investment – and I don’t mean just for the equipment. You need the expertise and the engineers, R&D and quality experts.’ ■

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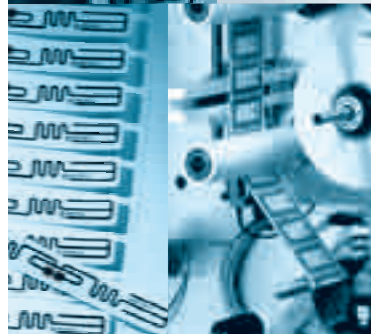
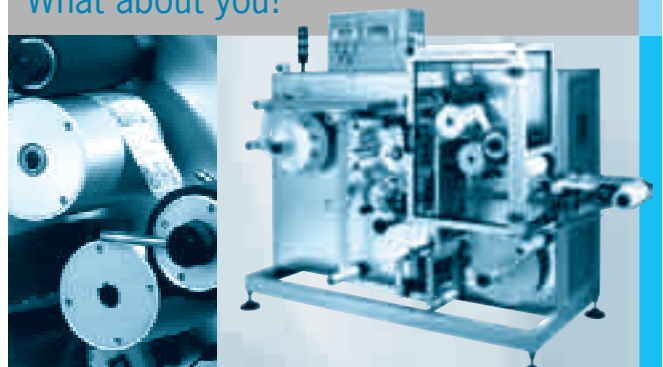
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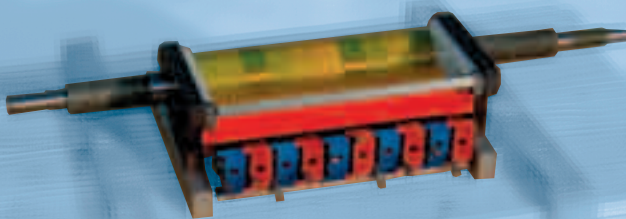
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Smart label news

SATO cuts GEN2 RFID labels price to 19 euro cents

SATO UK has cut the price of self-adhesive EPC RFID tags after commissioning a brand new RFID label manufacturing line.

Part of the international SATO Corporation, SATO UK now offers 4' x 6' (100x150 mm) EPC Class 1 RFID labels, in both Gen1 and Gen2 specifications at the extremely competitive price of 19 euro cents each on orders of a million or more, further reducing the cost of implementing and running RFID systems.

New production line equipment, commissioned in December 2005, automatically inserts RFID inlays into self-adhesive labels. An in-line process tests each individual label to verify that the labels are fully functional. It means that every part of the print and production process for RFID tags is now in-house.

'With everything under one roof, we can offer customers these highly competitive prices and short lead times,' commented director of production Ian Curle. 'The whole RFID production process has passed all our quality and efficiency trials with flying colors. We're delighted to have this additional facility fully operational for 2006.'

These EPC UHF products complement the HF range already supplied by SATO and are currently manufactured in three standard sizes 4' x 2' (100x50 mm), 4' x 4' (100x100 mm) and 4' x 6' (100x150 mm). They can be supplied plain, part printed or fully printed in up to six colors.

'SATO has been at the forefront of RFID label development for several years and is already experienced in supplying RFID labeling solutions in Europe and the US, where the uptake of this technology is more advanced than here,' added SATO UK's marketing director, Mike Aiken. 'We are able to advise on issues encountered by businesses introducing RFID and ensure they make the most of its many benefits. With our new table top and automatic application systems for printing, encoding and applying RFID labels, we offer the UK supply chain a fully supported, genuine one-stop service for RFID labeling.'

New Jersey offers RFID labels

New Jersey Packaging, a dedicated partner for pharmaceutical printing solutions, now offers a full range of pre-printed and die-cut pressure sensitive cGMP compliant labels incorporating RFID tags, announced by Dr Narendra R. Srivatsa, the company's business development manager/brand authentication.

These pressure sensitive labels, with 100 per cent readable RFID tags, are delivered ready to use for a wide range of

applications, including item-level products, as well as case and pallet lots. New Jersey Packaging can also provide support to help ensure that RFID implementation is successful.

The RFID labels are part of New Jersey Packaging's new RxTrackNSecure protective product line that, according to the company: 'makes use of the latest technology in antidiversion, anti-counterfeiting and anti-fraud printing methods to provide durable, easy-to-apply, and relatively affordable ways to guard against pharmaceutical product fraud and maintain consumer confidence and safety.'

First EPC Gen 2 tagged pallets shipped to Wal-Mart

The Educational & Productivity Solutions (E&PS) business of Texas Instruments Incorporated (TI) has announced it is the first consumer goods supplier to ship RFID tagged cases and pallets based on the Generation 2 (Gen 2) Electronic Product Code (EPC) specification to Wal-Mart. Starting with a dozen product lines shipped to five distribution centers, TI E&PS, a Wal-Mart next 200 supplier, is tagging cases and pallets of its graphing, scientific and financial calculators using Gen 2 smart label solutions from Texas Instruments RFID Systems, NCR Corporation and Zebra Technologies.

Initially twelve of TI's core calculator product lines, which represent 100 per cent of the products being shipped to and carried by Wal-Mart, now carry Gen 2 tags.

Advancements in retail supply chain data exchange processes enabled by EPC Gen 2 will allow TI E&PS to achieve improved product visibility and lower out-of-stocks at the retail store. TI E&PS began its development and implementation of EPC Gen 2 in 2004, deciding to leapfrog legacy EPC Gen 1 solutions which will be phased out in 2006. In building its Gen 2 implementation plan, TI worked closely with retail partner Wal-Mart.

'TI is ahead of the curve with Gen 2 adoption, and we commend them on being the first to begin Gen 2 tagging of cases and pallets in support of Wal-Mart's RFID expansion plans in 2006,' said Simon Langford, RFID strategy manager at Wal-Mart.

'This marks a significant milestone for our business and the industry as a whole,' said Keith Hodnett, vice president, Texas Instruments and supply chain manager for E&PS. 'Moving forward, we are prepared to expand our Gen 2 efforts with other retail trading partners when they are ready.'

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A Future Glimpse

James Quirk reports from the RFID Futures Conference and Networking Forum in London

The RFID community gathered recently in London for the RFID Futures Conference and the fifth staging of the RFID Networking Forum. The events took place at the Sheraton Skyline Hotel in Heathrow, and provided an excellent mix of demonstration, discussion, and networking opportunities.

The RFID Networking Forum attracted record numbers of end-users, with over three hundred delegates participating in sixty interactive sessions. Every delegate was able to create their own personal agenda, from a wide menu of options including think tanks, discussion groups, presentations, case studies and one-on-one meeting opportunities.

Feedback from the Forum showed that 99 per cent of those attending thought the event lived up to or bettered their expectations. 97 per cent found the topics covered to be good or excellent, and 95 per cent thought the event offered good or excellent networking opportunities.

The think tank format proved especially popular, with executives from a range of different industries coming together to discuss the specific challenges and opportunities that RFID brings.

The RFID Networking Forum also attracted many of the key suppliers of RFID technology and services. Sponsors and exhibitors for the event included: Siemens, Sato, Zebra Technologies, SAP, Domino, Oracle, TATA, Microlise, Nokia, Intermec, IBM, Datascan, Paxar, Printronix, Mantic Point Solutions, DSP Design, Avnet, Intrinsyc and Toshiba. EPC Global, GS1 UK, DTI and the Chartered Institute of Logistics and Transport.

The RFID Futures Conference provided a glimpse at how RFID could impact not only the economy but also society as a whole in the future. The conference was chaired by Bill Thompson, a new media pioneer and BBC broadcaster, and showcased a number of different RFID applications that have the potential to change all of our lives.

Dominic Matthews, publicity manager, said: 'The events were a huge success, building on our reputation as Europe's best end-user RFID event.'

The next RFID Networking Forum will be held on May 25th 2006 at the Olympia 2 Conference Center in London.

An extended version of this article, including the results of the

RFID Breakthrough Awards, has been published in our new online newsletter Smart Label News. Please visit our website, www.labelsandlabeling.com, to subscribe. ■



(top) Nigel Montgomery, AMR Research, presents the RFID Breakthrough Awards; (below) over 180 key industry players gathered for a gala dinner

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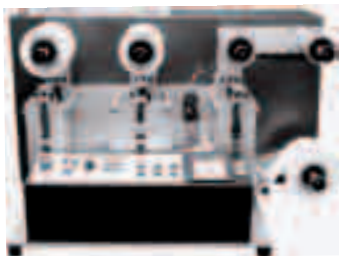


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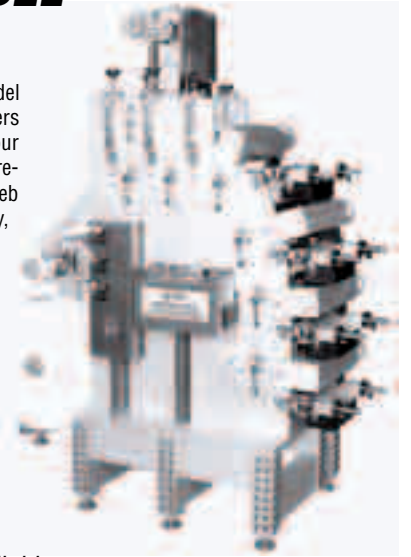
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Sony ships it with RFID

Zebra, Symbol, Mieloo & Alexander and SAP collaborate to implement a successful RFID solution

Sony Logistics Europe B.V. (SLE) in Tilburg, The Netherlands, is the European distribution center of Sony Europe. It stores all product ranges of Sony Electronics, which are shipped in by truck, sea and air freight from plants in Europe, Japan and Asia. SLE, which has a 'footprint' of about 80,000m², distributes directly to dealers and to local Sony warehouses across EMEA. The consumer electronics industry is highly competitive, and Sony Supply Chain Management is constantly looking for ways to advance its operation and to move ahead of the competition, in support of Sony's strategy to be 'preferred supplier' to all its dealers. RFID technology is regarded as a promising means to enhance operations, reduce cost, improve quality and minimize risk. Of course, it also fits developments at major clients of Sony in Europe, like the Metro Group.

Supported by integrator Mieloo & Alexander, SAP, Zebra Technologies and Symbol, SLE initiated an RFID test and pilot program in 2004. After extensive readability tests in 2004, Sony and Mieloo & Alexander began in January 2005 with the preparations for an RFID/EPCTM UHF 868 outbound 'slap-and-ship' pilot between the distribution center in Tilburg and Birkart Logistics in Cologne. Birkart is the third-party logistics provider that handles all Sony deliveries to distribution centers and stores for major custom customers in Germany.

RFID project objectives and scope

The objectives were to:

- Determine the impact of RFID technology on the outbound processes, and on the processes downstream of SLE
- Understand the data volumes and data handling issues
- Develop hands-on knowledge and expertise of RFID hardware and software integration
- Determine the potential to implement RFID upstream in the supply chain

The scope of the pilot is case-level tagging of outbound shipments of Sony flat-screen and CRT televisions from SLE to Birkart. The processes include:

- tag commissioning
- case level scanning of pallets at the outbound dock door
- scan to trailer

- ASN (Advanced Shipment Notification)
- goods receipt check at inbound
- reporting and analysis

The RFID system scope includes:

- Alien Lepton 96 bit tags
- Zebra RM4plus tag commissioning printer
- Symbol AR-400 RFID reader and ANT-400 antenna
- SAP Auto AII version 2.1 middleware / RFID application software (SLE runs SAP R/3 and SAP WMS 4.7)
- SAP Netweaver and Business Warehouse

The challenge

This is the first implementation in The Netherlands utilizing direct integration between SAP AII 2.1, Zebra and Symbol RFID equipment. This complex integrated RFID system is based on state of the art, just released components, requiring the partners to work closely together.

Results achieved

The project team, consisting of the experts at Mieloo & Alexander, SAP, Symbol and Zebra delivered the first operational, directly integrated RFID UHF 868 project in The Netherlands. Currently, operators at SLE tag daily the LE individual cases of 10 to 20 pallets. The RFID systems at dock doors of SLE and Birkart read the tags. On a daily basis the results are being analyzed with SAP

Business Warehouse reports. This leads to constant enhancements of the RFID installation. And it enables SAP, Zebra and Symbol to improve future releases of their product, ensuring that new users will be able to benefit from the new technology at an even faster rate. Sony, Mieloo & Alexander, SAP, Zebra and Symbol have gained extensive knowledge and expertise of the process, organizational and technical impact the integration of RFID technology has on a logistics operation. The RFID pilot program for 2006 will include generation 2 tags and readers, further warehouse internal pilots, and most likely an extension of the pilot up and / or downstream in the supply chain. ■

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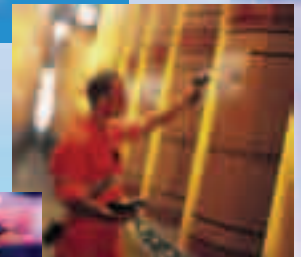
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Advantage RFID

Simon King, director of Domino Printing Sciences' Integrated Solutions Group, argues that organizations adopting RFID technology are realizing the advantages presented by a more efficient product/asset traceability system

The implementation of RFID technology is on the increase as the multitude of benefits it brings become apparent – particularly the improvements in product and asset traceability. The most powerful drivers have so far been the large retailers, particularly in the US, who have issued compliance mandates requiring their suppliers to implement RFID to both reduce numerous logistical costs and work towards the elimination of 'out of stock' situations.

As a global supplier of integrated coding systems, including RFID technologies, Domino is well placed to observe international trends in RFID; and although the popular perception is that the financial gain from RFID is one-sided, in favor of the retailer, it is becoming increasingly clear that product manufacturers are discovering that they too gain enormously from RFID technology. As a result, there is an increase in 'closed loop' applications, where an organization employs RFID to improve its own internal asset tracking or work in progress flow (WIP). The automotive industry, for example, is increasingly using RFID to enable its 'just in time' manufacturing capability, and aerospace giants Boeing and Airbus, fierce competitors in a tough market, are collaborating to ensure the technology is adopted by their common parts suppliers.

In the pharmaceutical and healthcare sectors, manufacturers see the technology's enormous potential to create of an 'electronic chain of custody'. By authenticating a product and tracking it from its basic raw material constituents through to a manufactured item, and subsequently to all points in the healthcare supply chain – right through to when it is dispensed to the patient – there is significant opportunity to improve patient safety and reduce counterfeiting of legitimate product. The gains may run into billions of dollars.

Ongoing developments in RFID will quicken the pace of

adoption in 2006. A new generation of UHF tag/reader configuration (Gen 2) is progressing from prototype to full production and related technology providers are continuing to make significant advances with their product and system capabilities. These developments have recently been reinforced by a sharp reduction in the cost of UHF Gen 2 specification tags – arguably a main point of contention with volume manufacturers looking to implement RFID technology.

Towards systems integration

These are the opportunities, but when it comes to evaluating and introducing RFID technology, the vast majority of manufacturers are still unclear as to how best to approach the subject. At first sight, the market presents a vast array of technology providers, each apparently promoting a specific part of the total system requirement; and since no single company owns all the technologies required, it quickly becomes apparent that there is a need for systems integration capabilities to combine the myriad of technology offerings into complete solutions.

Furthermore, it is important to understand that RFID typically represents only part of an organization's product/asset coding and traceability system; and that product tracking in particular generally has to incorporate some form of linear or non-linear bar code and human-readable alpha/numeric information. Rarely are these identification formats mutually exclusive, and this is certainly the case with emerging RFID technologies: increasingly the focus is turning towards the integration of RFID as part of an organization's total architecture to provide complete product/asset traceability.

There are an increasing number of examples in the pharmaceutical area where the drive for product serialization requires that multiple code formats co-exist in order to provide 100 per cent identification guarantees.

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A typical example involves the use of High Frequency RF tags (13.56Mhz) coded with a unique product ID (typically an EPC code), which is then transferred to a laser device that repeats the code within a two-dimensional format together with a degree of human-readable information. In addition, RF and machine-readable vision cameras verify code accuracy through a database controller, so that the product proceeds to a subsequent packaging station with both RFID and additional 'redundancy' fully provided.

Serialization then continues to further packaging stations where individual items are aggregated to secondary shipping containers, which typically receive UHF RFID tags and bar code data formats. Finally, cases are further aggregated onto pallets, where appropriate, for transfer to a warehouse environment and subsequent onward shipment through the supply chain.

Plan for the future from the start

While you may not anticipate needing a system as sophisticated as this, when planning for RFID implementation you should think ahead to how your use of the technology might develop.

In my experience, the majority of first-stage RFID installations are run as technology assessment pilots, where the management of code data is kept simple and the customer is presented with a relatively straightforward initial introduction. However, at this stage it is still important to start with an end goal in mind, even if it represents an intermediate stage leading towards full implementation. You need to consider an appropriate migration strategy, which means ensuring that

“At the outset, you need to clearly identify the objectives of the program and develop an appropriate scope of work before you embark on the introduction of coding and verification devices”

first-stage applications incorporate the flexibility to escalate to higher production volumes.

Unless you get to grips with the variety of technology options on offer, you risk making costly mistakes. At the outset, you need to clearly identify the objectives of the program and develop an appropriate scope of work before you embark on the introduction of coding and verification devices and supporting software. Spend time with your systems integrator: they will help you evaluate your requirements for an RFID-enabled solution and identify those important areas specific to supporting RFID technology within a supply chain environment

This will involve assessing organizational implications before arriving at solutions based on the most appropriate technology available – preferably one based on an open platform approach to ensure that only the best-in-class solution is implemented. Once a suitable architecture has been defined, it will need project management to see the application through to successful installation, and a period of continuous evaluation where the use and effectiveness of RFID can be measured.

Automating RFID application

Whatever solution you decide on, a key consideration is how to incorporate RFID application in the most efficient and secure manner. Our experience at Domino is that the higher the volumes, the better it is for product codes – including RFID – to be applied at the point of manufacture. This helps to ensure that the process is automated, so reducing unnecessary cost, and extends traceability of the item right back to the point of origin.

Within the consumer packaged goods (CPG) context, most attention has so far been paid to the RF tagging of cases and pallets. Volume manufacturers may run outer carton lines at production speeds in excess of 50 cases a minute, with each carton potentially requiring an encoded tag, correlated barcode and human readable text – all checked and verified for accuracy and readability. There is no room for failed codes within a system



designed to provide 100 per cent accuracy.

There are a number of issues that need managing here, including the elimination of failed tags, and the ability to write to a tag and apply it to a carton at speed – all while ensuring that corresponding printed information is also transferred to the carton. A further major consideration is to ensure that the tag is placed in the 'optimum read position' on the case to guarantee successful reads without compromising the position of the barcodes (as required by the GS1 global standard).

At Domino we have developed a number of solutions to these issues which maximize performance while incorporating as much flexibility and as many cost-benefits as possible into the process. The solutions include tackling aspects such as the choice of tag architecture and design; where and how to place tags onto products; how to ensure the tags read successfully within the unique operating parameters of the distribution chain; how to provide an effective means of data integration through a WMS and ERP framework that will enable the value of the data (EPC and/or other formats) to be realized; and, importantly, how to integrate RFID codes with existing coding and validation platforms so that the organization achieves a single, co-ordinated, track-and-trace-architecture.

Go global

So while RFID application is still new to most manufacturers, there is a growing recognition that it presents a remarkable opportunity to adopt standardized systems that allow real synergies to be developed across organizations. This is where real benefits will be realized – through common approaches on a global scale and a period of evolving best practice that drives operational efficiencies up and costs down, leading to better informed and more competitive organizations. ■

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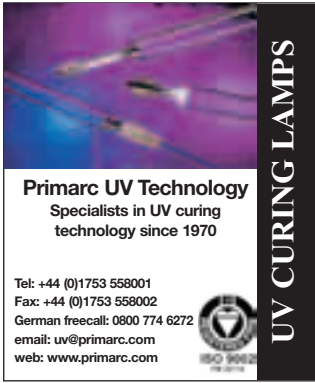
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