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IN ARGENTINA; MARZEK INSTALLS BRAVA PRESS

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THE WIDER WORLD
OF NARROW WEB
MARCH 2009

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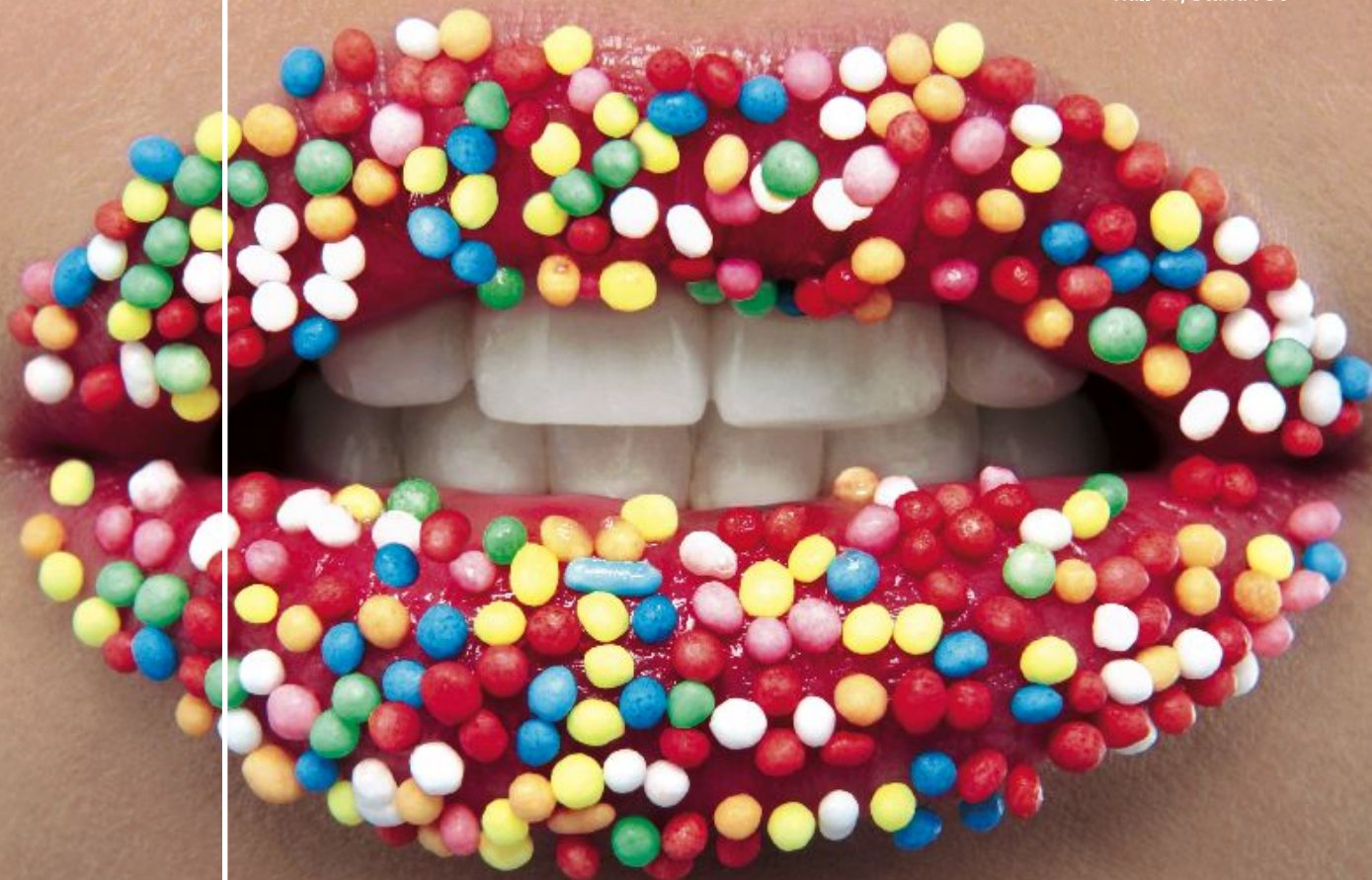


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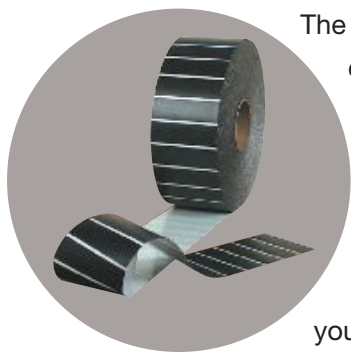
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5,000 Indian converters turned up for the India Label Show in Delhi looking to invest in new technology

A RESILIENT INDUSTRY

With Gidue going into liquidation, the recession has claimed its second major supplier victim following the demise of Rotoflex last year. Materials manufacturers are making deep cuts in their global workforce; press sales have declined and there has been a steep fall in the volume of pressure-sensitive labelstock sales.

But what is truly extraordinary is the resilience of this industry. Rotoflex has been snapped up by Mark Andy/MAI, and CEO Paul Brauss says the company will honor the deposits taken for Rotoflex machines before the acquisition. There is no legal obligation on Mark Andy to do this, but it is the honorable course of action, and already the company is reporting its first new orders. Gidue's Federico d'Annunzio says all press orders taken before the company was liquidated will be fulfilled through his new vehicle, Gidue-Nuova Castagnoli.

If we look at converters, while business has been hit hard, there has not yet been the surge of liquidations we have seen in other industrial sectors. L&L has seen many cycles of downturns and recessions in its 30-year history, and the pattern has been similar. Consumers still require similar volumes of pharma, food, household, personal care and beverage products – although there may be a migration to 'value' brands – and these goods still need to be shipped. End users run down existing inventories, but will replenish them. And as the upcoming Tarsus Digital Label Summit will show, the recession opens up new possibilities to work with retailers on short run, targeted promotions.

What is different in this recession is the drying up of credit lines for new machinery. This, clearly, is outside our control as an industry. We will just have to see what the world's politicians can do to force the banks to start lending again.

ANDY THOMAS

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L&L

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INBOX

THE FUTURE LOOKS DIGITAL – OR DOES IT?

With the Digital Label Summit in Barcelona fast approaching, there is undoubtedly a heightened awareness of the on-going potential of digital printing for label production. Many label converters that I have spoken to in the past year seem to believe the real future for digital label printing will be in high-quality, high-speed inkjet technology with high performance finishing systems. But how close to reality is this?

Well, the Daily Mail in New York is now being produced full size at 128 meters a minute by inkjet, in full color and at a quality level indistinguishable from the original version. So now the reality perhaps seems very close. Particularly so when you also read that companies such as Hunkeler and Dainippon, both well-known to the label industry, were part of this major achievement.

Digital (primarily HP Indigo and Xeikon machines) already makes up around 15 percent of global annual new narrow web label press installations which, even without inkjet, is expected to rise to 20 percent or more within the next five years. New generations of high quality, high speed inkjet might then take the annual installed label press base of new digital presses to nearer 40-50 percent within ten years – or maybe sooner.

As a further comment, if the Daily Mail can be printed in New York today in color at 128 meters/min, why not digitally print Labels & Labeling this way in the future? Satellite digital printing plants in the USA, India, South America, etc, could print the magazine locally in the future and obviate the current vast global postal costs. Faster distribution, instant up-to-date news – even personalized local news items. Now there's a thought.

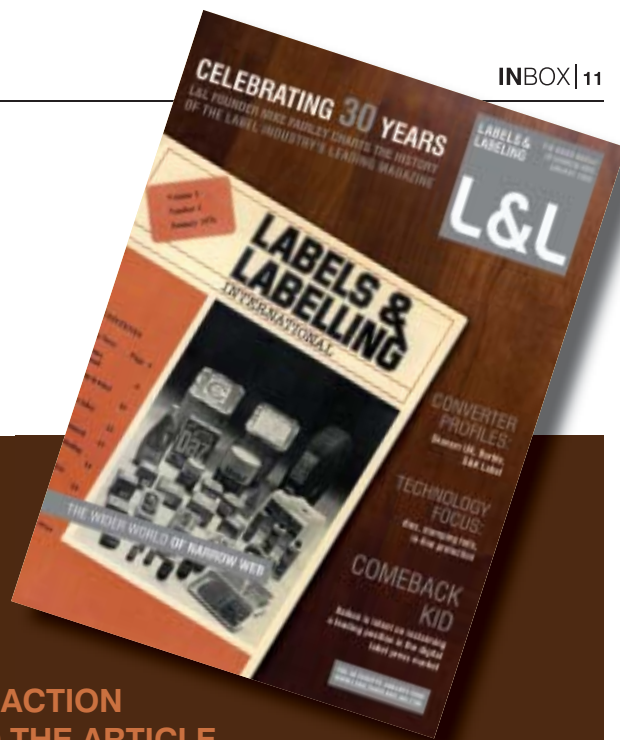
Mike Fairley, director strategic development, Labels Group, Tarsus Group

It's far from certain that inkjet that will lead the way in future digital label printing. Issues of head life longevity at speed are significant, and the issue of blocked nozzles has often impacted the quality of samples I've seen in the past 12 months. There will always be a mix of wet ink label printing and digital, but the issue at the moment is more of quality and productivity. In this respect, the HP ws6000 and Xeikon 3300 still lead the way, and are pretty much on a par with each other, depending on your exact needs. I don't see inkjet impacting that for the next five years. Process inkjet is not a retrofit onto conventional presses due to web tension issues, and so you need a proper full width setup that is productive, reliable and can make you money.

Is there such an inkjet beast able to cope with the many different substrates we want to work with in label printing? Newspaper is one thing....

Dr Adrian Steele, Mercian Labels, UK

For extended versions of these threads, plus the chance to contribute, visit www.labelsandlabeling.com/blog.



REACTION TO THE ARTICLE 'BLINDED BY THE LIGHT' IN L&L ISSUE 6 (P.101-102)

The mentioned article is in itself very interesting and gives a good view on what are problems in the graphic arts sector with regards to color measurement. Looking however to the measurements, the conclusions and the recommendations I see a lot of inconsistency.

It is surprising that VIGC is so surprised about the found variation of dE almost 4. This is a long known fact and the reason that the tolerances in the ISO standards 2846 and 12647 are as large as they are right now. Due to the variation in geometries, light sources and other variables which are not well specified in the ISO 13655, it is still a surprisingly small variation.

In the article, seven devices were compared, with significant but very specific differences. Unfortunately there are no serial numbers of software revisions specified. IGT did similar research on over 40 instruments in early 2008, of which 21 were of the same 'type' as these seven. With these 21 and the recorded serial numbers and revisions we can easily see that three of the seven instruments are of a different revision and sold in packages for a different target group!

I am not here to defend the spectrophotometer industry, but it is not fair to say that these instruments are 'not top class'. It is like in high school: one can be top of the class each year but only in the last year you are really the top of all classes. One cannot expect that the top of the class of \$1,000 instruments has the same performance as the class of \$5,000 or \$15,000. It would also be a miracle if the average of the \$1,000 class would match the average of the other classes, although they may under circumstances give identical results.

In the tests executed by IGT we found more problems with cleaning, wrong settings, wrong dE calculation settings, calibration procedures etc. than with the actual differences between the different instruments. A dE of 3 or 4 is no problem if the source is known. So, training and education throughout the organization is getting more and more important.

Eddy is right stating that we should not judge only by the numbers – rejection should be because of visual differences. So the discussion should be about the viewing conditions on the press console, perfect D50 color matching tubes with an acrylate plate which is a perfect UV shield, and so on.

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NEWS

HOT OFF THE PRESS

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CCL LABEL EXPANDS IN ASIA

CCL Label is investing CAD 25 million in expansion and four new factories in China, Japan, Vietnam and India. The aim is to double its turnover within a few years on Asian emerging markets, where the turnover was expected to be CAD 40 million in 2008.

According to Geoff Martin, president & CEO of CCL Industries, the expansion is necessary because these markets have a growing significance for a number of CCL Label's major global customers.

'The goal of CCL Label is to be locally present wherever customers set themselves up. Today the sales on these "emerging markets" constitute 17 percent of CCL Label's turnover, a share that is expected to increase to 30 percent within 3-5 years.'

The plan involves setting up four brand new factories and extending existing factories. In Vietnam a new factory is being set up in Ho Chi Minh City, which is to supply labels for manufacturers of products for personal hygiene. The prospective new factory in Pune, India, will also primarily supply customers within personal hygiene.

In China considerable resources are being invested in extending the factory in Hefei, which will be of great benefit to CCL Label's customers in the Shanghai region. In Japan the existing sales and technical facilities are to be extended with a brand new label factory.

CCL Label started on the Asian market by investing in a factory in Bangkok, Thailand.

ESKOARTWORK SLASHES GLOBAL WORKFORCE

EskoArtwork will reduce its worldwide workforce by around 10 percent, the company has announced. In addition, it will reduce its operational spending. The current economic slowdown and 2009 global outlook has led to this decision, despite profitable growth in 2008.

'2008 continued an unbroken record of growth in our bottom line over the past five years,' commented Carsten Knudsen, CEO of EskoArtwork. 'However, we cannot ignore the current economic conditions, nor the outlook for 2009.'

In the coming year we will concentrate our efforts on servicing our large current customer base and our strategic developments while acting in a more conservative manner in other areas.'



RECESSION CLAIMS GIDUE

ITALIAN press manufacturer in liquidation looks for new start

Gidue, active in the label and packaging market since 1999, filed on December 22 for voluntary liquidation. The press manufacturer says it had been enjoying record sales up to July 2008, but a statement announced that the global recession 'has hit the company far beyond any possible expectation, causing an unexpected strong downturn in sales, which are no longer sufficient to cover the company's fixed costs'.

Nuova Castagnoli, a former supplier of offset print units, vision systems and hot stamping technologies to Gidue, is to take over service of existing presses and new sales. Federico d'Annunzio, managing director of Gidue, is also MD of Nuova Castagnoli.

Negotiations are ongoing with local trade unions to transfer part of Gidue's

work force to Nuova Castagnoli, and to keep in place the existing plant in Turate, north of Milan. Nuova Castagnoli is planning to expand its existing manufacturing sites in Florence, and to change its trade name to Gidue - Nuova Castagnoli S.r.l.

d'Annunzio tells L&L that orders which were taken before the company went in liquidation are now being manufactured, and will be delivered and serviced by Nuova Castagnoli. 'No order has been cancelled by the customer or refused by Gidue and customers are very happy to continue to work with us. In the meantime the machines which were in stock have been almost all sold. It is interesting that the machines were sold to existing Gidue customers, and also to new customers in France, Russia, Italy and India.'

MARK ANDY MARKS 100th CHINESE INSTALLATION

Mark Andy joined has with distributor United Printing Equipment & Materials Corporation to celebrate the 100th installation of Mark Andy equipment in China. The celebration honored the recent Mark Andy XP5000 sale to New Faith Hi-Tech Printing Ltd. in Guangzhou. Greg Palm, vice president of Mark Andy, and Benny Shaw, board chairman of United Printing, presented the 100th installation award to Chen Jiandong, general manager of New Faith.

More than 200 printing industry professionals from the region were in attendance at the event, including Wu

Wenxiang, honorary chairman executive of Printing Technology Association of China, Xu Jinfeng, vice chairman executive and secretary-general of Printing and Printing Equipment Industries Association of China (PEIAC), Tan Junqiao, senior adviser of Printing and Printing Equipment Industries Association of China (PEIAC), Shen Haixiang, vice chairman executive of Printing Technology Association of China, and Xu Wencai, vice president of Printing and Packaging Engineering of Beijing Institute of Graphic Communication.



BENSON GROUP DIVERSIFIES INTO PHARMA LABELS

UK-BASED folding carton specialist moves into the label sector

UK-based folding carton specialist Benson Group has moved into the label sector with the purchase of a Gallus EM340S press with a Scantech VisionTrack rewind and inspection machine for its pharmaceutical-focused Medica Packaging business in Crewe.

The company cites customer demand as being the key driving factor behind the move. 'We are now able to offer pharmaceutical customers the creation of cartons, leaflets and labels all from one production site. We do not believe that any other business in the UK is able to offer this single site production focus for pharma customers,' said Mark Kerridge, Benson Group managing director. 'Single site production helps to ensure consistency of print quality across all three elements, as well as offering customers the facility to purchase a complete packaging "kit". For many pharmaceutical companies a single site audit also offers significant benefits.'

The 7-color Gallus EM340S UV-flexo press is capable of a wide range of label production formats, including reverse printing, printing on adhesive, edge slit, in-line die cutting, as well as printing onto a wide range of substrates, from paper to unsupported film, with weights from 25 microns through to 400 microns. The flexibility of the machine means that other printing processes and label formats such as silk screen, foil blocking and 'peel 'n' read' can be added to the machine at anytime. Print production will use Benzophenone free, low-odor printing inks, suited for both food and

pharmaceutical packaging requirements. Anticipated average production speed of the machine is around 80 m/min.

Medica Packaging has installed a press comparator system in order to compare the 'first off' print production pass to a customer approved PDF – a move that the company believes is a first in the pharmaceutical label market. A camera system on the press then allows a live visual check of every printed label for the machine operator during the production run.

The Scantech rewind machine will also be equipped with the latest 100% vision inspection technology, inspecting every label 100 percent of the time. Another innovation of this machine is the re-inspection of labels through the vision system, to ensure that all waste is removed. The machine will also have the capability to verify barcodes and consecutively number each label all in one pass. 'Accuracy and quality of the finished product are critical in pharmaceutical work,' explained Mark Kerridge. 'This press provides a quality control system for label production that is second-to-none.'

The creation of the label production department at Medica is being overseen by Charlie McGrath, who brings his 25 years of label production experience to the role of labels and leaflets manager at the 100 percent pharmaceutical plant. McGrath's industry experience includes time spent in the production of pharmaceutical labels at MY Healthcare and Field Boxmore.

THE INSIDER

A ROUND-UP OF THE LATEST GLOBAL LABEL STORIES

WS PACKAGING ENTERS RFID JOINT VENTURE

Contactless technology specialist ASK and one of North America's biggest label converting groups, WS Packaging, have agreed a joint venture based in the United States. ASK contactless cards and tickets are already implemented in the transportation networks of several large cities including San Francisco, Los Angeles, San Diego, Houston, Atlanta, Minneapolis and Philadelphia. This Joint Venture will address the secure ID, mass transit, and financial bank cards markets in the US and Canada.

'We are very excited to join with a prominent expert in RFID technology,' said Terry Fulwiler, WS Packaging's CEO. 'ASK has been dedicated to contactless technology since its creation, and WS Packaging brings in a long experience and expertise in printing and packaging. This is a perfect marriage to meet the increasing demand for contactless products on the US market.'

SURON APPOINTS REPRO GRAPHICS AS INDIAN SALES AGENT

Flexible die and rotary tooling manufacturer Suron has appointed Repro Graphics as its sales agent in India. The relationship was finalized at the India Label Show in December 2008. Eliav Silberberg, marketing manager, flexible die division, says that the alliance is part of Suron's strategy to seek local presence in every market in which it operates. 'The new appointment will allow us a much closer relationship with our customers and far stronger position in the market. Furthermore, local sales people will now be giving our customers fast solutions and the technical support which is so critical in this field,' he said.

NORDENIA PLANS NEW PURE PP FILM

Nordenia Deutschland Gronau is currently developing a pure PP film which will be available later in the year. The company says that the main disadvantage of PP, in respect to the pre-treatment to enhance printability and adhesive anchorage, will be resolved by using a special treatment procedure. First trials with this special treatment equipment in laboratory scale reportedly show good results concerning surface tension level over six months.



GRAVURE PRINTER LAUNCHES DIGITAL FLEXIBLE PACKAGING BUSINESS

Foster Packaging has invested in an HP Indigo press ws4500 as part of its establishment of the first dedicated short-run digital flexible packaging business in the UK and Ireland.

The new service is called Flexible Express, based in County Louth, Ireland, and will focus on the production of pouches, printed film and bags. Foster Packaging's aim is to meet the short-run requirements of its customers while at the same time stimulating the market for short-run flexible packaging.

Foster Packaging's business is based on long-run rotogravure printing. Joe Foster, managing director, and business partner Paul Young recognized that their customers either wanted or would benefit from the availability of short-run flexible packaging. 'We see a strong potential for digitally printed pouches and bags,' said Joe Foster, managing director,

Foster Packaging. 'We want to create the need for short-run packaging. During a downturn companies look for new ways to market themselves and digitally printed short-run packaging is a great way to do that.'

Young, with a background in the label market, has watched the development of HP Indigo digital presses for several years, and felt that the time and technology were now right to launch the business based on the HP Indigo press ws4500. 'The quality of digital packaging printing is something we're very aware of as gravure printers,' Young said. 'There are other benefits to digital printing that are important in these challenging times: reduced stock-holding, less substrate waste during printing, less printed waste because you only print what you need, shorter times to market, and the advantages of variable data printing.'

NEW ERA WINS IRISH AWARD

New Era Packaging has won in the self-adhesive label category in the Irish Print Awards with its Sainsbury's Superior Dark Rum print.

Commenting on the production challenges, David Nevin, sales director, New Era Packaging, said: 'The winning drinks label required the highest possible quality of print. The artwork incorporated delicate screen work and extremely fine reverse print out of the 4-color process with an additional gold. Each color required the use of an individually specified line/cm anilox roller. For example 120 for the gold, 160 for black

LABELS&LABELING

and yellow with 400 and 800 being used for the cyan and magenta respectively.'

The anilox rollers were supplied by Sandon Global, who's MD John Millington commented: 'Our anilox roll technology played a significant part in a number of awards during 2008 including those of EFTA and FlexoTech. We are proud to be associated with companies such as New Era Packaging who are producing such high quality work.'



RUSSELL JOYCE FLINT GROUP

Russell Joyce, president Flint Group Narrow Web, aged 39, has died after collapsing in Malmo, Sweden. Russell began his ink industry career in 1991 with Coates Lorilleux in England. He joined the Narrow Web group of Akzo Nobel Inks (ANI) in 1997 and held both technical and market development positions. Following the acquisition of ANI, BASF Printing Systems and Flint Ink by CVC, he became general manager of Europe, Middle East, Africa and South America for Flint Group's Narrow Web business prior to being named president of the division in March 2007. Said Charles Knott, CEO of Flint Group: 'We are all saddened and shocked by the unexpected loss of a very young colleague and friend in the prime of his life.'

'We were all shocked to hear about Russell's untimely death,' said Andy Thomas, editor, Labels & Labeling. 'Russell was well known to all the Labels staff at Tarsus, and we send our condolences to his family.'

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WEB ORDERING WITH MIS SYSTEM HELPS UK CONVERTER SUPERIOR LABELS CUT MATERIAL ORDER TIMES

SHUTTLEWORTH MIS is integrated with Avery Dennison's Fasson Connect e-business portal.

UK-based Superior Labels was established in 1990 as a supplier of label products to the food, pharmaceutical, toiletries and automotive sectors. Until recently, the company ordered Avery Dennison's Fasson labelstock via its website – placing up to 30 orders a day. Although the system worked well, it was time-consuming. In order to reduce delays and improve its ability to record and track orders, Superior Labels has moved to an online ordering solution. Having chosen The Shuttleworth Management Information System (MIS), their next step was to integrate it directly with Avery Dennison's Fasson Connect e-business portal.

Fasson Connect is an electronic ordering system that saves time and money by reducing paperwork and limiting the possibility for human error. Orders are processed directly and orders can be made 24 hours a day, seven days a week. Orders can even be

pre-set. In addition, Fasson Connect offers increased security. All data is encrypted, and transmission is immediately confirmed.

Gina Coplan, buyer at Superior Labels, says: 'The benefits of using the Shuttleworth MIS together with Fasson Connect have been immediate. When we are placing up to 30 orders a day, this new system frees up valuable time. In addition, it virtually eliminates errors, ensuring that every order placed is correct.'

Avery Dennison assisted Superior Labels to ensure that their new system was linked in to Fasson Connect. 'The people from Avery Dennison explained everything to me simply and clearly. Now Fasson orders are entered once and as soon as the order is approved in The Shuttleworth System the order is sent to Fasson to be processed. If there is ever a



problem, we are also notified,' says Coplan.

Superior Labels estimates that Fasson Connect has enabled the company to save a minimum of six and a half working days on the ordering process alone over a year – not counting the elimination of extra paperwork and the reduction of human error.

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SMAG HOSTS OPEN HOUSE

Smag's latest Discovery Open House event – held every two years – focused on 'Environment Protection in the Label World' and featured five daily conferences on the subject of sustainable development which can be downloaded from www.smag-graphique.com. The Discovery event, held in Smag's Savigny sur Orge factory south of Paris, was attended by French Ecology Minister Nathalie Kosciusko Morizet.

Other 'sustainability' elements included the announcement of a recycling initiative, a demonstration of furniture made from recycled cardboard and a 'bio lunch buffet'.

The Open House also enabled Smag to inaugurate its new production facility, which began operations earlier last year.

Machinery demonstrations included an Aquaflex 330 mm ELS servo-driven flexo press and a wet offset Iwasaki machine. Smag's own machinery on show included a Digital Galaxie digital print finishing line, a Galaxie flat bed screen press, and a C4R+ slitter-rewinder with an AVT Helios 100% inspection system.

The Open House was very successful, attracting 218 people from 83 companies over three days, along with 19 narrow web partner companies.

NEWS IN BRIEF

CHROMOS TO DISTRIBUTE EFI'S JETTRION 4000

EFI and Chromos have signed a letter of intent for the distribution and technical support of EFI's Jettrion 4000 UV inkjet system in Germany. The two companies' joint plans include a European Open House event at EFI's Ratingen facilities near Düsseldorf in early April.

MARK ANDY OFFERS HARPER'S ANILOX ROLLS

Mark Andy has partnered with Harper Corporation of America to provide, through its after sales support service, MAX, Harper's anilox rolls to Comco and Mark Andy press users worldwide.

EXXONMOBIL APPOINTS US FILM DISTRIBUTOR

The films business of ExxonMobil Chemical has appointed national distributors for its affiliates' oriented polypropylene (OPP) film products in the United States and Canada: Multi-Plastics, of Lewis Center, Ohio, and Multi-Plastics Canada.

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Handing release waste at Sara Lee



GLOBAL BRAND OWNER SARA LEE has generated savings of up to 50 percent on the cost of disposing of its release liner following a tie-up with Channeled Resources in the UK. Andy Thomas reports

With the growing importance of environmental issues, the failure of the pressure-sensitive industry to come up with viable solutions for profitably disposing of release liner waste is one of the biggest threats it faces.

It seems that no-one is prepared to take responsibility. Converters, understandably, do not want to take liner waste back, brand owners are happy (at the moment) to see it buried in the ground and it has not entered the consciousness of the global retailers despite their increasingly aggressive stance on 'green' matters.

So it is a real pleasure to come across one brand owner prepared to push release liner waste to the top of its agenda. The plant, based in Slough, Berkshire is a Sara Lee Center of Excellence for household products, and fills all Radox/Dushdas/Badedas bath products destined for the UK and Europe. The motivation was provided by environmental co-ordinator Krisztina Bordacs.

A recognized expert in waste water issues, Bordacs was originally brought into Sarah Lee to tackle waste water problems as the major environmental impact of the facility. Once that issue was under control, her attention was drawn to the biggest single source of waste leaving the factory – release liner.

Sara Lee applies front and back labels to 10 million showergel bottles a week, with some 7-8,000 labels on each 250m roll. After label dispensing, that glassine liner roll will weigh 7-8 kg.

In the UK, release liner is now classified as packaging by-product rather than industrial process waste, as it still is in the rest of Europe. This puts companies like Sarah Lee under an obligation to pay to have it taken away by a registered disposal company. And disposal costs are rising, with landfill charges increasing by 30-40 percent over the last two years.

Krisztina Bordacs approached Calvin Frost, CEO at Channeled Resources – long a champion of liner recycling – with a proposal to pick up Sarah Lee's glassine liner, take it away on a regular basis and recycle it. 'Cal told me that everything which goes out of this factory should be making money.'

Working with Channeled Resources UK manager Tony Loia, Bordacs picked one foam bath filling line to pilot the project and arranged for Channeled Resources to make its first pick-up of material last in February last year.

'My biggest challenge was convincing our line operators that release liner was an issue,' says Bordacs. 'I told Calvin this and he read me the riot act to start the recycle, and three weeks later we did the first pick-up. We were not well organized, but we did it, and the operators learned it did not require much more than they were already doing. There was no cost setting the system up – just time and the hassle factor. But the employees eventually saw that this was crucial to save money and hence their continued job security.'

LABELS & LABELING

Bordacs says it took 3-4 months to get a roll collection and boxing system going. 'Between December and March 2008 when we had the second pickup, we had sorted out most of the kinks, and we have now one pickup per month.'

The cores are taken from the applicators and put into boxes in two tightly packed layers. 'We started by packing in 230kg and we are now achieving 460kg per pallet. We have increased our overall packing efficiency from 35 percent to 80 percent in the last year.'

Bordacs took advantage of this success to reorganize the recycling collection on the packaging lines to give the operators more storage space. 'I could do this because everybody here knows that it was successful. The pilot line crews were recognized and it did not take much to understand that this make financial sense.'

The results were nothing short of spectacular for such a minimal outlay.

'In our first reporting year for Wastepack (a group which helps businesses comply with their statutory waste obligations), we must have saved Sara Lee 35-45 percent on its waste disposal costs. We have proven you can have both a better environmental and commercial footprint.'

The boxes of liner waste are collected by Channeled Resources and transported by road to Merseyside, in the north west of England. The liners are then shipped to India, where they are sold to paper mills for recycling into low-grade paper products like industrial towels and packaging materials.

Channeled Resources' Tony Loia recognizes that sending these materials to India is not the best solution. 'In India, paper prices have collapsed and suddenly we're losing money. But we can't pull out. If we stop recycling, we will not start again. I have tried to sell this liner waste in the UK, but nobody wants to use it. But if you can use it in paper mills in India, why not here?'

For Sara Lee, the lessons of the Channeled Resources project are clear. In the group's latest environmental report, its Slough factory will be held up as an example of best practice for the company's global operations.



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MPS INTRODUCES FINANCING GLOBALLY

MPS has rolled out worldwide the financing project which it created to support the foundation of its Latin American operation in 2007.

The financing program, which is specifically tailored towards the label printing industry, is supplementary to a company's local credit and allows customers to obtain low interest rates and terms of two to five years.

The finance staff have specialized knowledge of the label market and can quickly react to individual requests, reports MPS. The whole procedure, from application to final approval, takes 6-7 weeks, excluding the customer's preparations of documents.

RAFLATAC INTRODUCES NON-ADHESIVE MATERIALS SERVICE

Raflatac is now offering a 'flexible and cost-efficient opportunity' for narrow web printers to access a growing market for non-adhesive products. Fast Web creates a one-stop shop for these products, with minimum order quantities starting from 1,000 m² and rapid delivery promised.

BEWARE FALSE ENVIRONMENTAL CLAIMS SAYS AUSTRALIAN PAPER INDUSTRY COUNCIL

Some companies are deliberately exploiting the limited understanding of forest management certification among consumers and the general public, according to the Australian plantation products and paper industry council (A3P).

The council says most consumers are unlikely to understand the fundamental difference between forest management certification and chain of custody certification.

This distinction is vital, and far more important than the minor differences in specific forest management requirements between the two major certification systems, the PEFC (Program for the Endorsement of Forest Certification) and FSC (Forest Stewardship Council). Richard Stanton, CEO of A3P, said: 'The fact that a mill or a company has chain of custody certification says nothing about its environmental performance. Only if that mill or company is able to source a sufficient volume of its wood from a certified forest can it make a claim about

these credentials of its products.

'Importantly, chain of custody certification does not tell consumers anything at all about whether a company operates legally or meets international labor or human rights standards.

'We are strong supporters of sustainable forest management certification. The majority of our plantation grower members have achieved certification against either the Australian Forestry Standard and/or the Forest Stewardship Council (FSC).'

According to the council, forest management certification is an assessment of the performance of the forest manager against a standard, generally covering environmental, economic and social criteria.

Chain of custody is merely a means of ensuring that the origin of wood can be traced along the manufacturing and marketing chain so that consumers can be informed about the source of the wood in the end products they are buying.

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VERDIGRIS WEBSITE PROMOTES THE POSITIVE SIDE OF PRINT

Verdigris, an environmental research initiative, is encouraging those in the printing industry who want to know more about green issues to take advantage of its library of articles, news and reference links, now available online at www.verdigrisproject.com.

The articles are written by experts in their fields and cover a variety of topics relating to the environment, such as explaining the basics of carbon footprinting. There are also useful reference documents such as Heidelberg's Environmental Directions and Sustainability Report, plus news feeds from such as the New Scientist and Environmental Protection UK. A directory of ISO 14000 certified printers is underway, and there is no charge for compliant printers who want to be included in this directory.

One of the aims of Verdigris is to promote the positive side of printing's environmental initiatives and legislation. 'The printing industry must get much better at presenting its green credentials,' said Laurel Brunner, managing director

of Digital Dots, which is responsible for Verdigris. 'Printing is not about dead trees, greasy ink and stinking landfills. This ugly image may have once been true, but it does discredit to an industry which has changed dramatically towards a greener future.'

Verdigris is about sharing information so anyone with an interest in printing and the environment can provide material for the site. This is an educational site where reference material and links to industry associations and environmental organizations are made freely available.

Many suppliers to the printing industry are supporting the Verdigris initiative, including Agfa, Canon, Fuji, HP, Kodak, Ricoh and Screen.

STORK APPOINTS ITALIAN DISTRIBUTOR

Stork Prints has appointed Milan-based paper converting and specialist printing agency SO.MA.CA to distribute the Dutch company's reusable nickel RotaPlate screen in Italy.



In L&L issue 6 2008, pages 46-7, two of the captions are incorrect. Due to an unfortunate error, the original photograph was cut in two, and the wrong captions appended to each picture. Here is the original photograph with the correct caption. Apologies to all involved (Andy Thomas, editor).

(l-r) Iban and Ester Cid, Andrea Vimercati, Bibiana Rodriguez, Julie and Frank Sablone

POLISH ASSOCIATION ANNOUNCES CONFERENCE

The Polish Flexographic Technical Association is to hold its annual narrow web conference in Warsaw on March 11 2009. The conference will be accompanied by a table top exhibition. The conference will cover all aspects of narrow web exography and will include a presentation from L&L editor Andy Thomas. For more information, contact biuro@ekso.pl.

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BIG ISSUE

Question: How can label converters best respond to the challenges presented by globalization?



RICK SPEAR
CEO, SPEAR

If you are a regional label supplier and most of your customers are regional businesses, you probably have little to be concerned about, at least for a while. But, if you are a regional supplier and many of your customers are becoming multi-national in scope, you better prepare yourself for a difficult time. With the growing pressure on lowering costs, many multi-national companies are looking to source global suppliers which may offer equivalent or better products at lower costs. The value you have offered your customers in the past will most certainly be challenged.

After entering the beverage market in 1991, Spear began exporting products to the UK and, soon thereafter, to Western Europe. Eventually we were pulled into various geographic markets by our global customers and their requirements. Over the following 17 years, we adopted initiatives to help us grow with our global customers. Firstly, we determined that in today's economy it was essential to be a low-cost manufacturer, so we invested heavily in the proper equipment to drive costs down. Secondly, we developed a universal platform which we employ at each site. Thirdly, this manufacturing platform was underpinned with a proprietary IT business system throughout the entire group. Each site is equipped with the same assets, capabilities and real-time information systems that enable us to print the same label with the same results anytime. Fourthly, we followed our customers. Often it was necessary to establish manufacturing sites in critical regions to fulfill specific economic challenges. Lastly, we closely monitor the regional currency exchange rates to attempt to protect ourselves from any volatile swings in the market.

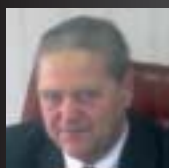


DAN MUENZER
VICE PRESIDENT, MARKETING, SPEAR

Successful global label printers align themselves with multi-national customers as it is hard to create international success by aligning with just the local market. This strategy provides opportunities for the printer to be 'pulled' to local markets by existing international customers and allows it to 'push' for opportunities in new markets. Initial demand can be serviced by importing from existing print sites; but the global player will need local production to ensure its long-term success. All aspects of the international print operations and sales should be full-time employees of the current printer.

It is important for printers' global operations to be consistent with the company's mission and brand position; however, you need to recognize the need to modify certain areas to the regional requirements. Successful businesses listen to the local culture. They stay true to their core, but do so in a way that is accepted by the local operations. Recognize that most global companies utilize a hybrid decision-making process. Relationships with headquarters are important, but they will be undermined by local operations if they are not equally good in the immediate market.

Profitable global printers communicate extensively within their own organization to leverage international success with local customer operations. In many cases Spear knows more about its customers' global operations than they know themselves due to our targeted focus. This provides us with a competitive advantage over local printers as we are viewed as bringing value beyond the supply of a label. Our international success is often leveraged into global contracts that provide both parties with financial incentives to further expand the business base.



LUIS MARIA GARCIA
PRESIDENT, MULTILABEL

Globalization will affect countries and companies to different degrees, depending on the state of their production and finances, but it is a reality that has come to stay. Many global companies are asking their CFO and purchase managers to cut costs and make drastic savings, especially under the current economic circumstances. For Multilabel Argentina and Multilabel do Brasil, globalization brings challenges, but also opportunities. We are a very important part of the supply chain and we must bring innovative solutions to our customers.

We must also 'think global', as they do, and Multilabel, as a leading label converter, has been thinking about globalization since our foundation in 1992. Within a few years we began

our commercial activities in Brazil and in 2000 we opened a complete printing plant in São Paulo as a way of bring local service to our international customers.

We knew at that time that the colors, the substrates, the inks and printing technologies were critical aspects, and so we bought the same presses and made deals with the leading global suppliers, creating a lean manufacturing strategy in both plants. We did the same with Multilabel Mexico and we expect to follow the same line with Multilabel Chile and any other markets we move into in the future. We supply labels to all kinds of markets: food and beverage, pharmaceutical, healthcare, industrial, in-mold, security, promotional, etc, but all of them have the same requirements: consistency in appearance to integrate the global chain.

With the increase of e-commerce, B2B portals and the use of internet, globalization is going to grow rapidly and those who are still thinking on what to do or how to avoid it, will one day wake up and find out that their business is gone. This, for sure, is not going to happen to Multilabel.

ENVIRONMENTAL NEWS



Packaging's future LEEDers

CLEMSON UNIVERSITY'S new LEEDs certified Sonoco Institute for packaging research opens its doors to students, the industry and innovation. Danielle Jerschefske reports

The Harris A. Smith Building, home of the Sonoco Packaging Institute at Clemson University in North Carolina, has been designed both to meet the needs of an educational facility, and to facilitate sustainable innovation in the packaging industry. This multidisciplinary, LEEDs (Leadership in Energy and Environmental Design) certified space is designed to promote interaction amongst three interrelated college departments – Graphic Communications, Packaging Science and Engineering Films/Fibers – and their associated industry mentors. The first LEEDs gold certified building on the university's campus opened its doors for classes in January. The official Open House will be held on March 31, 2009.

LAYOUT AND TECHNOLOGY

On the lower level of the three story building students have access to a Printed Electronics Lab and an Advanced Printing Technology Lab outfitted with a new 20 inch UV flexo Omet Varyflex, which will eventually boast hot air dryers, rotary screen and gravure stations. 'With this unusual press our students will push the limits of materials and will stretch what is done with printing as far as a manufacturing process,' explains Chip Tonkin, the Sonoco Institute's director. 'We plan to take the idea of printing into an entirely different arena.'

The middle floor hosts a Prototyping Lab where students are able to transform their packaging from ideas into physical product for the shelf. This area will include shrink sleeve sealers and tunnels. Next to this prototyping area, the Institute will 'take these packages and put them into context' with the Consumer Experience Lab that will simulate a mini-market with shelving, freezers and refrigerators and a checkout. Tonkin says, 'we'll be able to look at the functionality of the package and how a product sells.' Complete with an eye tracking system, users will also be able to objectively follow what catches a consumer's eye and in what sequence.

LABELS&LABELING

On the top floor, EskoArtwork has donated computers with large screens and its latest software to the Packaging Supply Chain Lab to make it a full feature laboratory that's 'great to teach in', allowing the instructor to view each user's screen while viewing their own. Also sharing the third floor space is a small auditorium, a few breakout rooms and offices.

SUSTAINABILITY LEADS TO EFFICIENCIES

Recent studies released by the USGBC (US Green Building Council) indicate that Green building is a 'key part of America's economic future'. 'The building cost can be between 1-3 percent more when LEEDs factors are taken into account,' says Josh Andrews, project architect from Lord, Aech and Sargent, 'but the payback is much higher. If a building will be used for longer than ten years then an owner must consider how environmental benefits can induce cost savings.'

The idea of a 'Green' building initially sounded 'esoteric' to Tonkin. Yet his outlook has changed since he has been part of the LEEDs design and construction program. 'They look at all materials used for the building, how the building is used, how people will communicate within it,' Tonkin explains. 'It's been fascinating to see how many sustainable choices will drive the efficiency of the building. I realize now that sustainability and efficiency go hand in hand.'

REDUCE

With the round-the-world energy crisis, it's more efficient to make things smaller. Space has been conserved everywhere possible, reducing the materials required. Efficiency takes priority. On the top floor, the double loaded corridor hosts the computer lab on one side with the offices on the other. 'With this well-organized plan we were able to meet the needs of the building while using a smaller space,' Andrews explains.

To reach the print room located on the bottom floor, only one

staircase has been built to save space; because of this design feature, the printing lab is larger and the money for stairwell materials has been used elsewhere, for instance on the outside of the building where materials costs are traditionally pricier. Solid water and air barriers on the roof and exterior walls provide additional energy reduction. Window placement and orientation, a critical design tactic, have been positioned to utilize natural and artificial energy in the most optimal ways. On the west side, the windows run vertically, reducing the amount of glass needed, whereas the Eastern side has more glass; the morning light is cooler than the afternoon light. Roof cantilevers overhang to screen some sun, working together with the brick piers and columns which also act as a sun shade.

These features combined with numerous others on the exterior of the building gave Andrews the ability to reduce the size of the mechanical system (bigger equals higher consumption).

RECYCLE

Specific design elements have been brought in to enhance and reflect the connection between the building and product development. Case in point, the concrete floors are made up of recycled content stripped from consumer product waste such as plastic bottles. The project has received an innovation credit for having over 30 percent recycled content within the building, including the furniture. Even on-site benches and mulch have been harvested from trees previously on the plot.

Water is recycled through what is called a 'bio-swell'. This is something that captures a majority of the water on site and filters it before it returns to the water supply. This feature with myriad other water flow reduction systems allows for at least a 40 percent reduction in water usage – an extra innovation credit was also awarded for this.

CO2 REDUCTION

The building received yet another innovation credit because over 30 percent of the supplies were sourced locally. 'A majority of the project's materials are made in South Carolina,' Andrews says – the bricks, concrete and steel. This combined with regionally contracted business significantly reduced the amount of CO2 emissions released into the atmosphere during this project's completion.

One final feature – the monumental stair – has been designed to truly connect the building and its occupants to the ultimate goal at hand: packaging innovation. Just as the glass staircase is eye-catching with a notably gorgeous tree behind it, so is packaging intended to be eye-catching. A key goal is to more closely align packaging to natural resources, and with both the technology at hand and the industry's support, the Sonoco Institute has the opportunity to become the much needed Petri dish that will lead packaging towards a more sustainable future.



TWO SIDES GATHERS MOMENTUM

The Two Sides initiative, organized by the UK's National Association of Paper Merchants (NAPM) to address misconceptions surrounding paper and the environment, has seen Sun Chemical, UPM-Kymmene and Portucel Soporcel back the campaign to add to earlier support from Sappi and Stora Enso.

Alistair Gough, NAPM president, confirmed that the recent participation of uncoated fine paper manufacturer Portucel Soporcel completes the list of major European groups which have joined the initiative. 'Two Sides is clearly gathering momentum, and we are extremely excited about working with our supporters to move the initiative forward over the coming months,' he said.

Martyn Eustace, heading Two Sides for the NAPM, has urged printers to get involved: 'So far, Two Sides has been funded largely by suppliers to the print sector. It's now time for printers to get on board and early in the New Year, backed by the BPIF, there will be a major campaign to get widespread printer support. It should not be left to a generous few to sustain the funding.'

Printers can join Two Sides for a subscription of GBP £25 per million of UK turnover, with a minimum fee of £150.

FASSON REDUCES WASTE TO LANDFILL

The Fasson Roll North America division of Avery Dennison Corporation has developed a focused team armed with Enterprise Lean Sigma (ELS) tools and methods to support the corporation's goal to reduce waste sent to landfills in North America by ten percent when compared to 2007 levels. In pursuit of this goal, the divisional team has reported tangible results by diverting 94 truckloads of material going into a landfill with a process improvement to its Fasson Exact program.

This focused internal team reviewed the Fasson Exact service program and analyzed the trim waste of existing master rolls. It then streamlined a process that took better advantage of master rolls widths resulting in less trim. This resulted in a significant reduction of trim waste – up to 7.6 tons/day – delivered to and placed in local landfills.

AVERY LAUNCHES RECYCLED FILM

Avery Dennison has launched a transparent self-adhesive film labelstock, Fasson R-PET50 Clear, which the company says is the first recycled film facestock in the label market to use post-consumer waste PET.

Avery Dennison offers the new 50 micron Fasson R-PET50 Clear film with a choice of adhesives, Fasson S692N for all-round performance, and, for extra clarity and tack, Fasson S4700. Both adhesives comply with international food labeling regulations. Completing the laminate is Fasson BG42 White glassine release liner, with no imprint.

ENVIRONMENTAL NEWS

BIOTAK contact adhesive has already been used by Berkshire Labels to produce fully biodegradable and compostable labels



COMPOSTABLE ADHESIVE

HERMA'S range of 'green' materials uses what it claims is the first fully biodegradable and compostable adhesive. Andy Thomas reports

Herma is offering a range of biodegradable and compostable self-adhesive label materials made from renewable materials and incorporating – for the first time, according to the company – a fully biodegradable and compostable adhesive.

62N BioTAK contact adhesive conforms to the European DIN EN 13432 compostable materials standard, and forms a key component of Herma's Naturefilm labels range. Naturefilm will initially be available with Innovia's cellulose Natureflex face film materials in white, transparent and silver grades, and a white, light-weight coated paper, all with a white glassine liner.

The compostable adhesive is a further addition to Herma's GreenLine product range. Just recently the company included PEFC-certified paper adhesives and label papers in its offering.

'Compostable materials based on renewable raw materials have already had a huge impact on the packaging materials sector,' explains Herma managing director Dr Thomas Baumgärtner. 'Consumers are already showing a growing interest in where packaging comes from, and whether they can be sustainably sourced; natural cosmetics, fruit and vegetable packaging and all the products in the burgeoning organic sector are good examples of this trend.'

Colin Phillips, general manager at Herma UK, points out that many supermarkets now have biodegradable packaging on which the label has to be removed before composting, as the adhesive has not been biodegradable.

In EN 13432 compliance testing Naturefilm performed well, reports Herma. To comply with 13432, 90 percent of the material must have biodegraded after 45 days. Herma's Naturefilm achieved this value after only 31 days and was fully degraded after 39 days. In addition EN 13432 sets a target of 90 percent disintegration in 12 weeks. Naturefilms showed complete disintegration in this period. The 62N BioTAK adhesive fully met EN 13432's ecotoxicity requirements and is FDA approved for indirect food contact, meeting the requirements of CFR FDA 175.105.

Natureflex face films are manufactured from cellulose supplied by FSC-certified companies, which guarantee sustainable forestry. The films can be printed using

water and UV-based inks by all conventional printing methods; they are antistatic and repel oil and grease. They also have a high water and oxygen barrier. 'Thanks to their high gloss level, they even meet the sophisticated needs of cosmetics packaging,' says Dr Baumgärtner.

Application temperature of 62N BioTAK is +5 degC and service temperature -20 – 80 degC, allowing Naturefilm to be used to label chilled produce. In coating tests, the adhesive performs like a general acrylic adhesive.

BioTAK adhesive was developed by UK-based Sustainable Adhesive Products Ltd, owned by Paul Roscoe, who is also owner and managing director of converter Berkshire Labels, a company which has won numerous environmental awards with compostable labels using BioTAK.

Last year, Roscoe made the decision to license the use of the BioTAK technology to Herma, which ran trials on its curtain coating lines in Germany for six months before commercializing BioTAK 62N as a component of its Naturefilm laminate.

Paul Roscoe set up SAP because environmentally aware customers were asking Berkshire Labels for a fully compostable label ten years ago, and none existed.

Although Roscoe concedes that progress has been slow in setting up industrial composting schemes across Europe, tests carried out by SAP suggest that BioTAK adhesive could be home compostable along with food waste. 'We have also carried out internal trials which suggests the glassine waste could also be broken down. Currently, we offer to recycle our customers' glassine into fuel bricks or back into other recycled fibers,' says Roscoe.

Although Herma is using Innovia's cellulose film in its Naturefilm laminate, Berkshire Labels has also used PLA labels with the bioTAK adhesive. Roscoe believes this 'to be an alternative environment friendly solution where PLA food packaging is currently being used across the globe.'

The first commercial application of Herma's Naturefilm range comes from Harlands Labels in the UK, for its customers in the health and beauty, toiletries, alcoholic beverages and premium food markets.

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Q&A

ANDY THOMAS talks to Clive Smith, the founder of Labelexpo

Clive Smith has been in the exhibition industry for all of his working life and is the founder of the Labelex Group of companies. He joined United Trade Press Limited in 1966 as a sales manager in its exhibition division. He left that company in 1974 to set up his own business, Clive Smith & Associates, which organized events as diverse as Textile Machinery, Transport Security and Medical Engineering. In 1979 he established Labelex to incorporate the exhibition interests of that business and to launch the Labelex exhibition in the United Kingdom the following year. In 1985 the event, by now called Labelexpo, made its home in Brussels. The first Labelexpo Americas was launched in 1989, with an event in Singapore created in the 1990s. In 1998, Clive's company became the founding exhibition part of the Tarsus Group, which has expanded the Labelexpo profile into China, India and South America. Clive remains a non-executive director at Tarsus.

L&L: When did you found Labelexpo and what made you see an opportunity for a pressure-sensitive label show?

CS: The first Labelex exhibition, as it was then called, took place in London in 1980. I had seen an opportunity for an event in the label sector a year earlier whilst organizing an international series of exhibitions for the clothing manufacturing industry. I noticed a small but increasing number of companies were coming to the event showing woven labels, printed tags and some early barcoding. Indeed, I went on to organize an event for this sector, called Garmentpack, covering all clothing packaging and logistics. However after some research I decided to launch a dedicated label show the following year, which took place at the Royal Horticultural Halls in London and covered the grand area of 1,000 square meters. Of course you have to remember that at this time pressure sensitive did not exist as a cohesive industry.

L&L: Why did you choose Brussels as the venue?

CS: We had four or five shows in the UK prior to going to mainland Europe and the decision to move outside the UK was based on several factors, not least that we could not get the show to grow to any reasonable size. As the UK lost its manufacturing base, it became increasingly a country of agents, and any major show needs to have principals exhibiting. We therefore sought a venue which would encourage the major manufacturing exhibitors to be there in their own right and looked for a country or city that would draw its visitors from several different geographical areas so that no one agent could cover it.

We also wanted to avoid Germany as at that time many of the names we wanted to attract saw Drupa as their natural home. Brussels fitted these criteria; also, it was the home of the EU and NATO and had an international reputation in excess of its actual size.

L&L: What were the early challenges you faced in getting Labelexpo off the ground?

CS: The main challenge was to get major players to see themselves as part of a new industry called labeling and not part of a larger print and packaging sector, and then persuade them to quit such shows and make Labelexpo their prime event.

L&L: What are your memories of the early pioneers of the PS industry?

CS: I had the pleasure of meeting several of the early pioneers particularly when presenting the Labelexpo Lifetime Achievement awards. The first was given to Stan Avery, really the father of



L-R Clive Smith and Mike Fairley at the reception for the Label Industry Global Awards evening at Labelexpo Americas last year

pressure sensitive, followed by the likes of Mark Andy, Ferd Rüesch Sr of Gallus, and others, all of whom were dedicated people, building lasting companies based on excellence in equipment, technology and service in an international market place. I particularly remember a remark by Stan Avery after he had visited the USA show, then only about 200 exhibitors strong. He looked down on the show and said: 'Well I guess we were always around but it's taken Labelexpo to make us realize we are an industry!'

L&L: When and why did you decide to extend the show to America?

CS: We knew that the USA had a similar sized market to Europe for labels but just as Drupa dominated Europe's printing shows so did various print and packaging shows seem to hold sway in the USA – CMM springs to mind. However, once we had convinced the major press companies to exhibit in Europe, we decided to launch in America. We had no presence in the USA and it took a lot of hard selling to get the first event off the ground and for us to be accepted. Fortunately, Mike Fairley had had some dealings with the TLMI and via these contacts we procured TLMI sponsorship of the event. Dick Schwartz, the then TLMI president, played no small part in establishing what has become an enduring relationship. Dick remains a personal friend, as do many of the TLMI presidents who succeeded him.

L&L: How important was the role of the twolabel organizations, FINAT and the TLMI, to the establishment of a successful Labelexpo series of shows?

CS: Although by this time we had two established and growing shows and an excellent magazine in L&L, we knew that to secure the events we had to be

seen as part of the industry, not just a commercial opportunist. To be fair we followed this practice with all our events, not just the label ones. To this end, we signed long-term agreements, first with the TLMI and a year later with FINAT, and I am pleased to say that this format of supporting the industry survives to this day and continues to serve the industry very well.

L&L: When and why did you decide to expand into Singapore?

CS: The idea of a global economy sounds totally natural today, even if it means you can have a global recession! However in the 80s and early 90s it was only just being understood, and China, even though a major force in manufacturing, was not seen as a natural venue for a trade fair. Therefore when we decided to add an Asian leg to complete the Labelexpo series at that time, we looked for a safe and stable home. The world's manufacturing base was moving East and, in keeping with our aim to always have a show that served and followed this base, the real choice for a venue was between Hong Kong and Singapore. However, Hong Kong was about to be handed back to mainland China and no one knew what to expect, so we went with the safe option at the time, hence Singapore.

L&L: What is your opinion of the current state of the global Labelexpo series of exhibitions? Had it always been your intention to make Labelexpo into a truly global brand?

CS: I believe that the current state of the Labelexpo series has never been better and the whole team that is involved today is doing an excellent job. The decision to move to China, in which I was involved, and Roger Pellow's decision regarding India, have strengthened the brand.

However, as you can see from what has already been said, from the moment we went to Europe in 1985, the aim was for a global exhibition brand.

L&L: What was your relationship with Labels & Labeling and how did the magazine fit into your strategy for promoting and developing the Labelexpo shows?

CS: My relationship with L&L goes right back to the first show in 1980, when I asked our exhibitors which magazines they advertised in. Fasson quoted L&L, which I hadn't heard of and couldn't trace. It turned out that just as this was the first Labelexpo show, so it was the first issue of the magazine. Mike and I met and L&L became and remained the prime sponsor of all the shows. Shortly thereafter I bought into the magazine company and thus began a partnership that was to last until the present day, and I must say that much of the strategy and success that the magazine and shows have enjoyed has been due to Mike and the original team who helped build this unique series.

From the earliest days, L&L was central to the promotion of the events and with its worldwide circulation it did, and still does, play a major part in the brand's strategy for growth and attendance.

L&L: Looking back, what have been your proudest achievements in the last 25 years?

CS: I am proud of having started an exhibition company in 1974, with a £1,000 overdraft, when everyone said we were heading into a major recession (and we did – nothing new there then!). However, we came out the other side and went on to become one of the few privately owned global exhibition and publishing companies in the UK, finally becoming the founding part of the Tarsus group in 1998. However, the fact that Labelexpo is said to be the only truly global B2B exhibition brand in the world does give me great pleasure.

L&L: Looking forward, what are the major trends you see for the Labelexpo shows and the global industry?

CS: I've always left the predictions of trends to Mike: he is usually right! As far as the shows are concerned, I'm sure South America has yet to see its best in the label arena, and provided China stays stable it's hard to see anyone overtaking it in manufacturing for the foreseeable future. And whilst people keep making things, there is always going to be a need for a label in some form or other.

NEW PRODUCTS



1 ANTIMICROBIAL LABEL M&H PLASTICS

With increased levels of interest in the health and hygiene arena, UK-based M&H Plastics has announced that its new antimicrobial product is now available with antimicrobial labels.

The antimicrobial additive helps stop the spread of infection and is clinically proven to be effective across a wide range of bacteria including MRSA, E. Coli, Salmonella and Listeria. It works by adding ionic silver which inhibits fungal growth and kills over 99.99 percent of bacteria within 24 hours, and is effective over the lifetime of the product. It is food-safe, has no effect on the product contents and is widely used in the NHS where it is accepted as one of the most effective antimicrobial additives. It can be used in the manufacture of bottles and jars and is available in SAN, PP, PET and HDPE.

As well as developing antimicrobial bottles and jars, M&H has worked closely with Royston Labels, a UK-based converter, to develop antimicrobial labels to further help combat the growth and spread of bacteria. The labels, which are available

in both clear and white, include active antimicrobial technology in the form ionic silver in the face material. Ionic silver is a natural compound which is 99 percent effective in limiting the growth of bacteria.

Simon Chidgey, sales and marketing director of M&H Plastics, said: 'M&H is delighted to have worked in partnership with Royston Labels to bring this new product to market providing a clinically-proven point of difference. The product is ideal for a wide range of cosmetic, toiletries and personal care products – in fact any market sector where a bacteria-free environment is important.'

Paul Clayton, managing director of Royston Labels, said: 'Following well publicized health scares resulting from the spread of deadly bacteria, there is now a much greater awareness of the importance of good hygiene. The development of products which are effective in preventing the growth and spread of these high risk bacteria can only help improve hygiene, particularly in those areas which are more at risk from the spread of infection.'



2 AUTOMATED INDEXING KNIFE APPLETON MANUFACTURING

The patented Automated Indexing Knife (AIK) for fixed knife cutters from Appleton Manufacturing automatically rotates the core cutter knife to produce more clean cut cores from every knife.

The indexer automatically and precisely rotates the knife based on a preset number of cuts.

While extending knife life, hands-free automatic knife adjustments also improve worker safety and decrease downtime. Operators now only handle the knife for blade replacement.

The AIK can be retrofitted to existing Appleton core cutters or added to new models. This easy-to-install indexer includes a control panel interface and a new knife holder.

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3

3 FILM SURFACE TREATMENT SYSTEM ETI CONVERTING

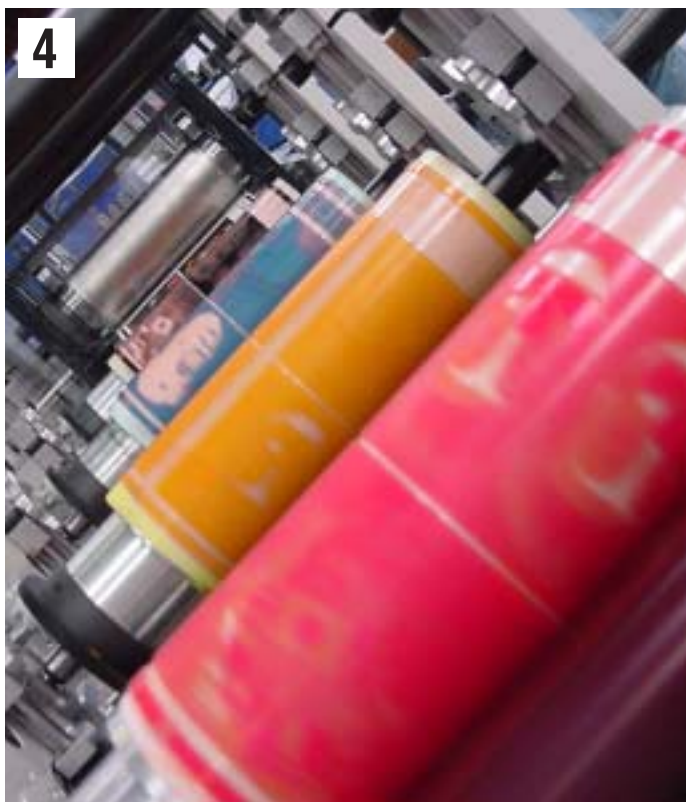
ETI Converting has launched its surface treatment system for film, the ETI-CPO. The system can be integrated into any of the company's in-line manufacturing presses, such as the Cohesio and Labeline.

President and CEO Francois Bayzelon explained: 'With our technology, we can offer printers the possibility of creating their own complete material or labels, all with a guarantee that they will save 30 to 70 percent by purchasing raw materials. Moreover, with this surface treatment unit for films, the notion of economy and producing complete material really takes full effect.'

The new system, ETI-Corona Plasma Optimum, or simply ETI-CPO, functions inside a controlled inert gaseous atmosphere, which sends a corona discharge to the surface of the film (PP, BOPP or PET), permitting the increase of energy to the surface, allowing for an excellent wettability and a superb adherence of glue, ink or any other coating. In experimental stages during the past few years, the CPO has now completed testing.

This plasma system does not emit any harmful ozone, on a preheated web at a temperature of 50 deg C. The integrated system will cool the web before entering the rotary press so it does not affect the location or the tension. This system is claimed to be environmentally friendly due to the reduction of solvents and varnishes usually used during traditional procedures to apply pre-printed coatings.

The ETI-CPO system can be used on the Cohesio or can be mounted on a rotary press that prints the facestock before applying the adhesive.



4

4 SHAFTLESS TECHNOLOGY FOR PROFLEX FOCUS

Focus has developed shaftless drive technology for its Proflex range of presses. The Proflex is Focus' fully expandable, inline modular press, available in 250 or 330mm widths, combining efficiency and versatility with a modular design that offers flexibility. In particular, the company says its compact footprint offers a short web path and good accessibility for the operator. The first Proflex to incorporate the new technology was rolled out last year, and the company is planning to introduce the larger Webflex model with servo drive in the first half of 2009.

DIGITAL COATING PLATE FLINT GROUP

Flint Group Flexographic Products has launched the first digital photopolymer foil-based coating plate for inline and offline print finishing, aimed at meeting the increasing demand for digital printing plates.

One of the key advantages of the digital coating plate nyloflex Seal F Digital is said to be improved quality of the finishing, due to sharper reverses and more open intermediate depths, which particularly benefits spot coating applications with negative elements. The nyloflex Seal F Digital plate allows 'very good results' in spot and full surface coating, in commercial and packaging printing on coated papers and board, says the company: 'The digital workflow is cost effective and environmentally friendly as no film negative is required. The digital data transfer reduces the failure rate and allows plate making without loss of quality.'

NEW PRODUCTS



6



5



7

5 PS LABEL APPLICATOR WEBER MARKING SYSTEMS

Weber Marking Systems has introduced its Tronics Series 3 pressure-sensitive label applicator, which can be configured to handle a wide range of package shapes and label configurations. The Tronics Series 3 is available in standard-, medium- and high-speed models that can apply up to 2,400 inches of label web per minute.

The systems apply front, back, wrap-around, top and bottom pressure-sensitive labels for a broad range of consumer package goods markets, including food/beverage, pharma/neutraceutical, personal care, household chemical, medical products and more.

The system also can be configured to handle a diverse selection of package shapes and sizes: flat-sided, round, oval/contoured, plus other shapes. The Tronics Series 3 dispenses and applies pressure-sensitive labels from 0.5 inches high and long to a full 10 inches high and 39 inches long.

In addition, the Tronics Series 3 is designed to provide quick product and label changeovers. Conveyor rails, labeling heads, wrap-around belts, aligning chains and other system modules all feature tool-less adjustments. Many adjustments can be made without stopping production through the use of the system's touch-pad control.

6 FOIL IMPRINTING SYSTEM PRIMERA TECHNOLOGY

Primera Technology, a manufacturer of specialty printers, has launched its new FX400 foil imprinting system. FX400, an optional accessory to Primera's LX-Series color label printers, works in-line to apply shiny gold and silver borders, fonts and other graphics to inkjet-printed labels. The effect is said to be virtually identical to traditional metallic hot-stamp technology, adding brilliant, shiny highlights to labels. Since the process is 100 percent digital, there are no set-up charges. Virtually any design imaginable can be printed.

Clear film for FX400 is also available. When printed onto inkjet-printed labels, it not only adds a professional, glossy finish but also makes labels virtually waterproof. Additionally, the clear film adds UV resistance to printed output, allowing longer exposure to natural and artificial light sources. Primera's exclusive PTfoil Software is included with FX400. The software makes it fast and easy to combine two different graphics – one for inkjet printing and the other for foil imprinting – on the same label. Also included in the system is a powder-coated metal stand for holding the LX-Series inkjet printer and the FX400 imprinter. The stand keeps both units perfectly aligned during production and allows a 'loose loop' between the two printers.

7 ROTARY DIE CUTTING MACHINES FOR IML PRODUCTS SCHOBER

After the introduction of its third generation rotary die cutting machine for the production of in-mold labels at Drupa 2008, Schober is now launching the model RSM-IML/MX, claimed an 'economical' machine for medium and small production runs.

The machine is available in working widths of 260mm, 330mm and 410mm. The MX model features nearly all of the technologies applied in the high capacity model, such as a heavy-duty rotary die cutting station, automated web guide, continuously monitored reinsertion, vacuum controlled product flow, static neutralizer and M-Stack delivery.

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MERGERS & ACQUISITIONS

A review of the factors influencing expansion and change

IN the first of a regular series of articles for L&L, Bob Cronin, managing partner, The Open Approach, looks at the emergence of mergers and acquisitions as an important weapon in the label converter's armory

The label industry has undergone remarkable change. Amidst technological breakthroughs, steady new substrate introductions and increasing global competition, Mergers and acquisitions have become of vital importance – as a method for both growth and survival.

In the last 24 months, we've seen huge activity: Multi-Color grabbed Collotype; Fort Dearborn bought Renaissance Mark; York Label made a number of moves – including a Chilean acquisition. Outside of the name brand power, these transactions made headlines because size brings significance. Competition is getting larger, better...tougher to beat. And customers are increasing demands for full-service providers.

Big company or small, M&A can help improve your position. It's not just an option for the industry majors; it's an opportunity for every label provider, and is often the quickest way to increase revenues, gain marketshare, and boost profitability.

While some activity has slowed down in light of the new economy, M&A remains one of the most influential factors for the label industry's expansion and change.

In order to capitalize of this lucrative trend, it's important to first understand the drivers behind it.

WHAT'S DRIVING THE INTEREST?

- **CUSTOMERS** – Pushed by the need to cut costs, streamline ordering, and maximize purchasing power, customers continue to shift their loyalty to providers with a robust and diversified lineup of offerings. At the same time, customers want superior service – giving more flexible players a distinct advantage.
- **FRAGMENTED US MARKETPLACE** – Despite its girth, the label industry – and print at large – is highly fragmented, with numerous players of all types and sizes scattered across the nation. Great opportunity exists in combining complementary capabilities while improving overall visibility.
- **PRIVATE EQUITY ACTIVITY** – In addition to the label 'notables', private equity firms are leading a significant amount of label M&A activity. JW Childs, Diamond Castle, Arsenal, Genstar, Linneage Capital, and WindPoint have all made acquisitions, and more investor groups are becoming interested in the label industry and the diversity of growth opportunities it presents.

- **GLOBAL COMPETITION** – US label companies face stiff competition from Eastern Europe, Asia, and other big markets, which produce various imports (for example, wines & spirits, foods, etc.) along with the labels/packaging that accompanies them. This effect is being exacerbated as US manufacturers outsource more production, losing the print that goes with their products and containers.
- **'HOT' TRENDS** – Macro trends for premium branding, security, anti-counterfeiting, standout POP, and the like have label buyers seeking providers with the depth and ingenuity for expeditious response.
- **RETIREMENT/OWNERSHIP EXIT** – Finally, many label entrepreneurs are selling their businesses. Whether to retire, diversify their investments, or simply change course, these individuals are adding numerous, interesting growth opportunities for prospective investors.

SO WHAT DOES THIS MEAN TO YOUR UNIQUE COMPANY?

At that surface, these drivers mean that as time goes on, your business will be faced with even more competition, continued cost pressure, and domestic market shrinkage. That said, however, these factors also present outstanding – and multiple – options for building, enhancing, and sustaining a highly profitable business.

Consider the overwhelming positives. At \$6.9 billion, the label industry continues to grow at a rate of 5-6 percent annually – far outpacing general commercial print and numerous others. Profitability is also superior, and is even more so for the well diversified. New developments and materials (foils, holograms, 'smart' labels, and microprinting, for example) continue to ramp up, making for exciting additional applications. The global marketplace (and weakened US dollar) presents an entrée – not just competition – into a bigger venue. (US companies hold only 28.4 percent of label share.) And finally, more properties on the market mean more possibilities to create an enterprise with a truly unique value proposition.

THE VALUE OF M&A ACTIVITY

The wisest M&A activity is not that which simply adds size, but truly yields growth. Plenty of reputable companies make

hearty acquisitions only to find no real tangible value. In my past life as CEO of Wallace, I struggled with this issue myself. At the time, all the buzz was about 'electronic forms', and everybody agreed that it was a 'must' to succeed long term. I jumped up the bandwagon, and for the tune of about \$8 million, acquired an electronic forms software company. It turned out that 'everybody' didn't include any of our customers. The experience, while expensive, provided a valuable lesson on how to pinpoint and examine true, value-driving acquisitions.

In our work at The Open Approach, we have guided numerous companies through the process, and have devised eight key considerations proven to generate the greatest outcomes:

- **OPERATIONAL SYNERGIES/DIVERSIFICATION** – Does the candidate broaden your capabilities, provide a new specialty, or help you move up the customer value chain?
- **GEOGRAPHIC EXPANSION** – Does the candidate extend your reach into additional strong label-buying territories?
- **CUSTOMER IMPACT** – What products/services does the partner bring that can be effectively sold to your customers? On the flip side, can your current offerings be sold to their customers? Are your pricing structures comparable and profitable based on the customers you will serve?
- **SUPPLIER IMPACT/PURCHASING POWER STRENGTHS** – What economies of scale will you gain? (Don't overestimate this; review purchases carefully and make a fair assessment.)
- **MANAGEMENT TEAM** – Will you gain a strong, collaborative management team that can facilitate integration and optimize the new enterprise's performance?
- **SERVICES PLATFORM** – What's the depth of the company's services platform, and how will this enrich what you have?
- **POSITION IN PRIME SEGMENTS** – Does the candidate have a good position in growth segments (such as digital, anticounterfeiting/security, or specialty decorative, among others)?

- **Position in prime verticals** – Can the company expand you into additional, strong verticals (pharmaceuticals/nutraceuticals, food & beverage, wine & spirits, consumer packaging, logistics, and others)?

M&A holds tremendous value for label providers of every shape and size. But, in light of recent economic circumstances, lending has become tighter – and some banks are on hold through year's end. While this slows down current activity, it also gives label companies some time to determine an M&A course of action.

In the meantime, review your strategic vision/direction and assess ways to capitalize on the proliferation of trends and opportunities. Tough times call for progressive – but judicious – strategies. A well-planned acquisition or sale may be the best means to ensure your company's growth.

In closing, I'm proud to release this as my first contribution in an ongoing series of articles for this fine publication. Labels & Labeling does an exceptional job in providing our industry with relevant news, topical articles, equipment releases, and strategic advice to help guide your company to prosperity. In the coming months, I hope to offer tips, advice, and proven strategies to further improve your success. Feel free to contact me at any time. I welcome your questions, suggestions – and support – and pledge to be a valuable partner to you for the road ahead.



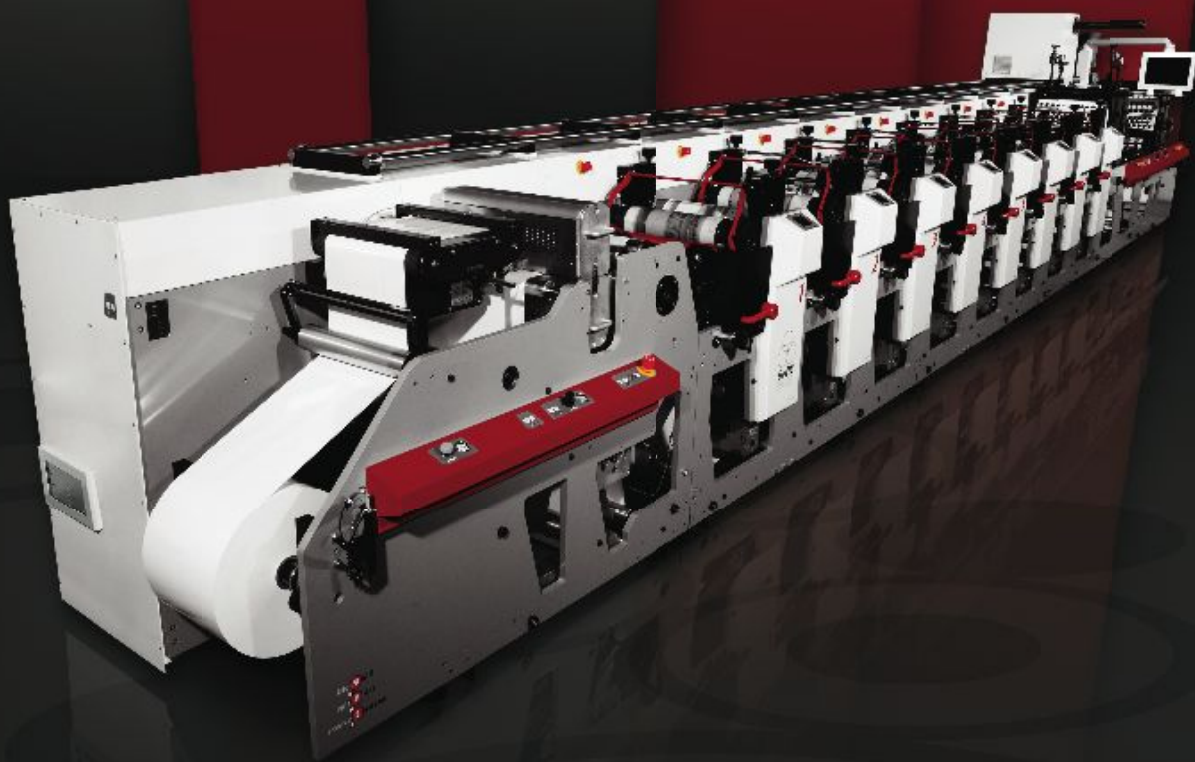
ABOUT THE AUTHOR

Bob Cronin is managing partner of The Open Approach, an investment banking/M&A firm focused exclusively on the world of print. The firm's proven results have made it the exclusive member-recommended firm of PIA/GATF and IPW. For more information, visit www.theopenapproach.net, email Bob Cronin at bobrcronin@aol.com, or call +1 630 323 9700.

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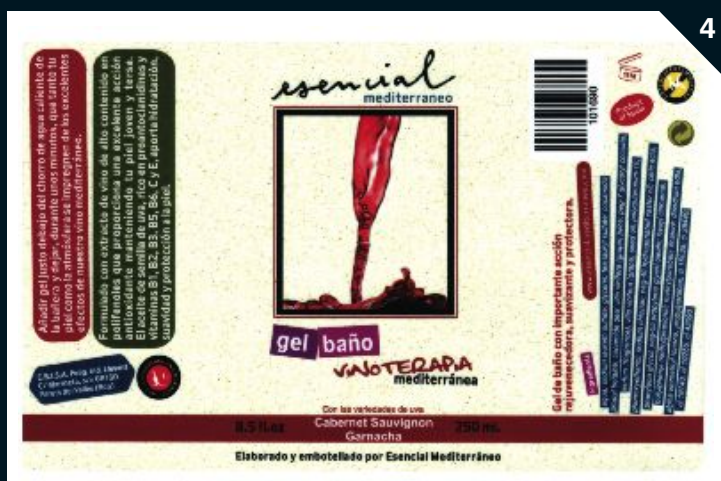
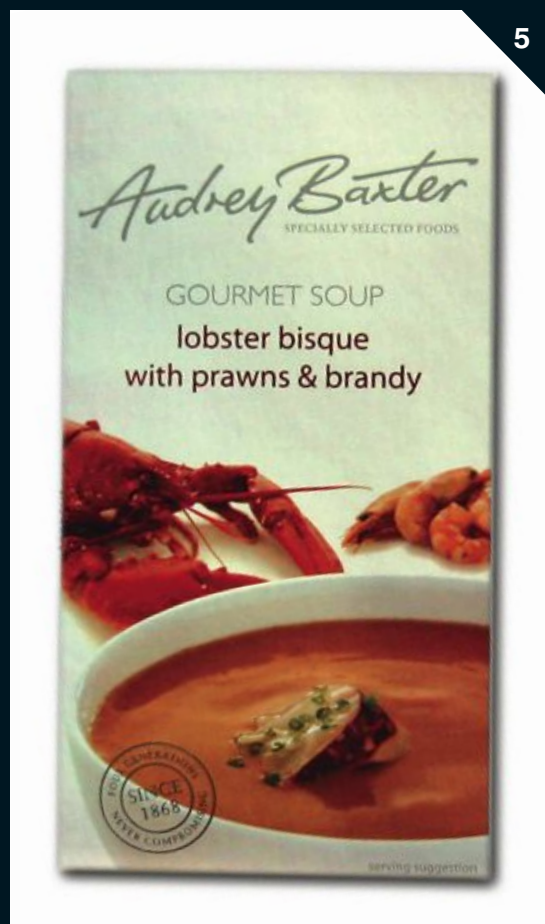
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5

LABEL EXPOSURE



1-4 TLMI AWARD WINNERS

Fifty-three converters from around the globe submitted more than 300 entries for this year's TLMI Annual Label Awards Competition. A total of 77 awards were presented, including one best of show, 51 first place awards and 25 second place awards. More than 10 percent of this year's entries came from countries outside of North America, including Italy, Spain, England, The Philippines, Scotland and Brazil.

1. MULTI-COLOR US Converter Multi-Color won first place in the Gravure – Color Process – Prime category for its Cascade All in One Complete label, which made use of metallics and vignettes to deliver a sparkle effect which makes the brand 'pop'.

2. NOVELPRINT Brazil-based Novelprint won the Letterpress – Rotary Color Process – Prime category with its 'Xuxinha Xampu' label for a shampoo bottle. Achieving tight registration was a challenge, as well as color quality with five inks. The label was printed with 175 line screen at a running speed of 200 feet per minute (61m/min), using inks from Flint.

3. LABELGRAPHICS Glasgow, Scotland-based Labelgraphics achieved first place in the Wine & Spirits – Flexo/Letterpress – Line – Prime category with a label for Passport whisky in Korea. Printed 7-color UV flexo on a Gallus press with hot foil and embossing on high gloss paper from Mactac using 133 LPI screen ruling, rotary cutting and photopolymer plates from Dupont Cyrel.

4. GERMARK The Digital Printing – Health & Beauty Products category was won by Spanish converter Germark, which produced an innovative design imitating a recycled paper for Esencial Mediterraneo shower gel. The label was printed 4-color onto film by an HP Indigo press.

5 UK PRINTER OF THE YEAR

5. THE LABEL MAKERS The Bradford, UK-based company scooped the accolade of 'Label Printer of the Year' in the Print Week Journal Awards 2008. Of the labels submitted, the judges were particularly impressed with the eye-catching reflective look of the Williams Bros Ales labels. Printed 5-color flexo on a Nilpeter press, the labels used opaque white to provide a base over which other colors could be printed, before a satin and scuff-resistant varnish was applied. Using silver metallic hot melt adhesive material, a simulated gold effect was produced using yellow ink and lacquer.

The Treasures baby wipe label, printed 6-color offset, has a 'peel and reseal' function on the pack and is laminated with 20 micron polypropylene material for durability. A pattern adhesive enables a dry tab to assist peeling back the label.

A blend of 60 percent gold and 40 percent silver metallic ink gives a quality look to the text on the Audrey Baxter range of gourmet soup labels. Designed to saddle a plastic pouch container, the labels were printed on a 6-color Nilpeter offset press with hot foil stamping.

HOW TO GET EXPOSED

Label Exposure is a new, regular section in *Labels & Labeling*. Submissions do not have to be a part of an awards competition – we are interested in any label which you feel deserves exposure. If you want to contribute, please send us information about who printed the label, for whom it was printed, and the specifications of the job. It is essential to include a good quality, high resolution image with your submission.

Contact: jquirk@labelsandlabeling.com.

EVENT DIARY

MARCH | APRIL

YOUR ESSENTIAL GUIDE TO UP AND COMING LABELS-RELATED EVENTS WORLDWIDE



26 - 28 February
Graphics of the Americas
Miami, Florida, USA
The expo and conference for the printing and publishing industry in North and South America.



4 - 5 March
ICE UK 2009
Manchester, UK
The latest edition of the printing, converting and flexo exhibition will take place at the Manchester Central Convention Center



4 - 5 March
EFTA Print Awards 2009
Manchester, UK
The European Flexographic Technical Association's annual print awards competition



19 - 22 March
LATMA Conference
Melbourne, Australia
The Australian association's three-day conference will also host the country's Label Awards



11 - 13 March
PLGA Annual Operational Conference
Miami, Florida, USA
The Packaging and Label Gravure Association hosts two annual conferences



4 - 6 March
2nd Annual Packaging and Labeling for Consumer Goods
Berlin, Germany
This conference will explore innovations in packaging design

7 - 8 April
Printed Electronics Europe
Dresden, Germany
Europe's largest event on printed electronics, organized by IDTechEx, returns to Dresden



6 - 9 April
Gulf Print, Gulf Pack and Label Summit Middle East
Dubai, UAE
The organizers of Gulf Print and Gulf Pack have joined forces with Labelexpo to bring together this new section of the show

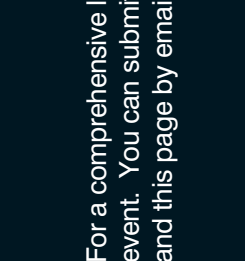
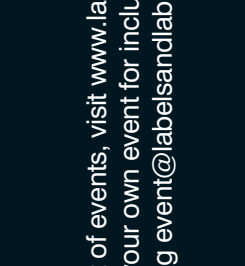


24 - 28 March
Converflex/Grafitalia 2009
Milan, Italy
Grafitalia and Converflex will be co-located with two other exhibitions, Ipack-ima and Plast



24 - 25 March
Digital Label Summit 2009
Barcelona, Spain
Digital Label Summit 2009 is a two-day conference and table-top exhibition

28 - 29 April
Label Summit Latin America
São Paulo, Brazil
Label Summit Latin America is a conference and table-top exhibition and the key event for the Latin American label industry



For a comprehensive list of events, visit www.labelsandlabeling.com/ event. You can submit your own event for inclusion on the website and this page by emailing event@labelsandlabeling.com.

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HANDS ON

VINCENT DITROLIO, president of the DiTrollo Flexographic Institute (DFI), will troubleshoot common practical problems encountered in flexo printing, in this regular series of articles. DiTrollo has worked in the flexographic printing industry for over 19 years, and provides training and consulting through his DiTrollo Flexographic Institute, which is approved by the Illinois State Board of Education and Department of Veteran's Affairs

Bring ink to press on color

Is Joe the press operator still using your \$300,000 press as a color proofer? Does Joe the press operator still argue that he can match color faster on press than in the ink room? Yes, Joe can add splash or plug to correct color press side and eventually get the match. But unfortunately, there are several things that this ensures, Joe will have to guess again in the future and the press will still not be running product while he tries to remember if he added a splash or a plug! Now, we realize that Joe is a great operator and does produce quality products with what he has, but in order to continue his growth and keep competitive in this global economy we need to provide him with the correct tools, procedures and practices to increase his efficiency and productivity.

While performing training at flexo printing companies another important area that is always addressed is ink management. When ink management is properly executed press side efficiencies and waste will be positively affected. The topics that are usually addressed include but are not limited to the following: Anilox volume standardization throughout press room, inking system standardization (doctor blades on all presses), ink mixing procedures, ink room inventory control, and hand proofer to press correlation. In this Hands-On article we will discuss proofer correlation.

TOOLS NEEDED IN AN INK ROOM

With the minimum of the following tools an efficient ink room can be properly managed.

1. A quality hand proofer with a doctor blade to ensure consistent metering of ink volume
2. A gram scale to measure and produce test samples and an appropriate sized scale to weigh and produce production size batches of ink
3. An updated Pantone Guide
4. A color viewing booth to visual check color samples
5. A PH meter and a Zahn cup to ensure a proper ink balance
6. A spectrophotometer



STEPS TO CORRELATE A HAND PROOFER TO PRESSES:

1. To begin the process, identify and label three test inks and verify that the inks are at their proper pH and viscosity. Select a light shade of red, blue and green
2. Gather three or four commonly used substrates to print test upon
3. Set up press with the aniloxes used for spot colors
4. Mount a tint sleeve on one print cylinder and a solid reverse plate on another.
5. Run solid ink coverage of the test inks on each of the substrates with both the tint sleeve and reverse plate, the tint sleeve maybe skipped if it isn't used in production. Depending on durometer of tint sleeve and printing plate material they may or may not deliver the same amount of ink volume. Therefore, it is important to test and compare both
6. Record technical data of the aniloxes (BCM & line count, and roller identification) and label printed samples. Bring samples and test inks back to ink mixing area. Using a simple chart will simplify tracking the correct rolls to be used

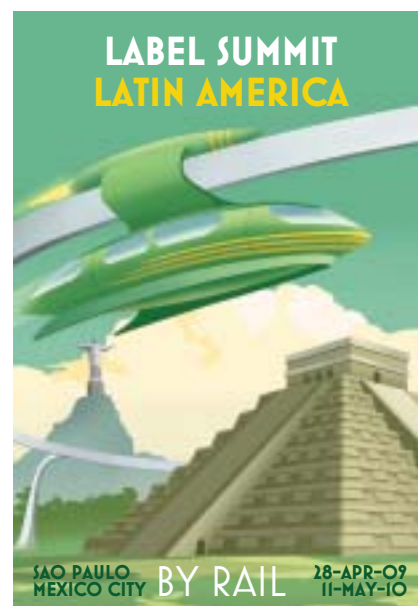
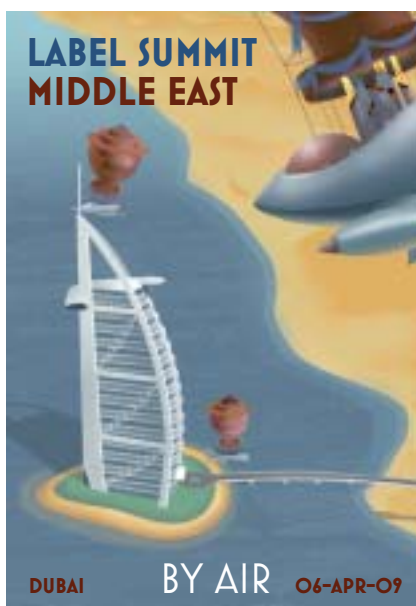
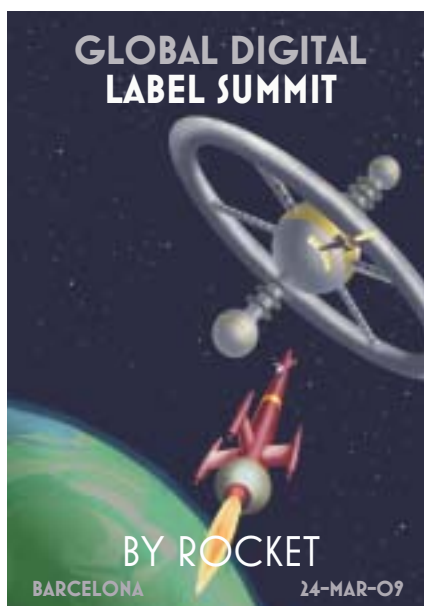
ANILOX CHART FOR 13" ACME FLEXO PRESS

Anilox ID	Volume	Line count	Substrate	Proofing roll	Notes
HG9001	4.1	600	Semi gloss	21	
HG442	3.5	700	BOPP	16	

7. Install hand proofer anilox with the closest volume to the anilox used on press into the proofer
8. Draw down a sample and compare to press sample. Repeat until a matching proofing roll is identified by having proof sample match press sample
9. Use visual and or measured values with a spectrophotometer to approve samples
10. Draw down samples of other test inks to confirm results
11. Record the results on the correct anilox roll chart

With the proper utilization of hand proofer and accurate record keeping, this simple process will increase press efficiency by reducing color matching time and waste. For more assistance contact your ink and anilox supplier. As always keep it simple and document.





Upcoming Summits to explore new regions and opportunities

LABELS & LABELING is involved in three important events this Spring – the Digital Label Summit in Barcelona, Label Summit Latin America in Brazil, and a first foray into the Middle East with a Summit at Gulfpack, Dubai.

DIGITAL LABEL SUMMIT

L&L is sponsoring a conference examining digital printing and digital workflow in Barcelona between 24-25 March 2009. The Digital Label Summit will concentrate on how to make money from digital printing using new business models, with case studies from successful converters from around the globe.

The program will feature keynote presentations from Tarsus' strategic development director Mike Fairley and HP Indigo VP Alon Bar-Shany. A panel session featuring P&G's global principal engineer Paul France and a top global design agency provides insights into what end users expect digital printing to deliver, and three international digital label converters from the US, South Africa and Finland discuss their experience in targeting growth opportunities.

Four streams are then available: one examines the paper and film requirements for digital printing – what's available and whether coatings are required for inkjet are two of the subjects tackled; a case study of a fully on-line digital printing operation from Borble in the UK; digital workflows from estimating and proofing to plate and cylinder production; and solutions for on- and off-line finishing of digital labels.

The second day kicks off with an examination of competing digital printing technologies by Mark Hanley of IT Strategies. The conference then examines how digital and conventional printing work together in the same plant,

drawing on the experiences of two of Europe's top label printers.

The final afternoon sees detailed discussion of a fully networked narrow web inspection system at X-Label in Germany, followed by a workshop on making sense of the latest developments in inkjet printing. The conference ends with a look at how digital printing widens the options to add brand protection and track & trace features to labels.

For more information visit: <http://digital.labelsummit.com>.

LABEL SUMMIT MIDDLE EAST

Label Summit Middle East will be held as part of the Label Pavilion at the Gulf Print/Gulf Pack exhibition in Dubai on 7 April 2009 between 10.00am-12.00 noon. The keynote session, delivered by L&L editor Andy Thomas, will look at the Middle East in the global label market, identifying trends in materials usage, printing processes, the environment and other issues revealed by a series of regional converter surveys. Speakers and top panelists from suppliers and converters around the region will then discuss trends in letterpress, flexo, offset and screen press technology, considering trends including the introduction of servo and sleeve technology to narrow web presses and adding value with multiple processes in-line. A panel session then examines developments in digital printing, workflow and finishing, closing with a discussion of new opportunities for label converters to

grow during the global downturn.

For more information visit: <http://labelsummit.gulfpack.info/>

LABEL SUMMIT LATIN AMERICA

Tarsus' Label Summit Latin America is the longest running of its conference and table-top exhibition events. Returning to São Paulo on 28-29 April for the third time, the conference will follow a new format this year, with the afternoon sessions breaking out into two different streams: one dedicated to business management; one to technology.

Prior these breakout sessions, a rich and varied conference program will focus on the state of the Latin American label industry; growth areas of the Brazilian market; the benefits of international partnerships; end user requirements; security and brand protection and the business case for environmental sustainability. The results of L&L's annual survey of Latin American label converters will be revealed, and more than 40 local and international suppliers will be on hand to discuss their latest technological developments.

The business management sessions will focus on new opportunities for your business, streamlining processes and economic issues such as financing. Technology sessions will include adding value to the printing process, a focus on pre-press, and developments in smart technology and RFID.

For more information visit: <http://brazil.labelsummit.com/>.

JOIN OUR NETWORK

“The first Label Printer’s Forum, was excellent from start to finish. It was intensive, constructive and gave me a lot of valuable insight. The seminar was the perfect size, just about 25 people and the discussions among fellow FINAT colleagues allowed us to really share experiences and learn about industry trends.”

Bjarne Svensson, Production Manager, Flexiket Denmark



FINAT is the premier world-wide organization serving the needs of the self-adhesive label industry. Founded nearly 50 years ago, it has more than 470 active members. FINAT membership opens the door to a world of opportunity.

FINAT provides exclusive market information for its members and facilitates a programme of invaluable networking events. We assist you with a range of professional services designed to enhance and promote the growth of the self-adhesive label industry.

Through focused industry events, including the prestigious FINAT International Label Competition, the 2007 World Congress in Berlin and our presence at Labelexpo 2007 in Brussels, we provide a forum for our industry members. FINAT is also a source of valuable market information and technical know-how for the industry.

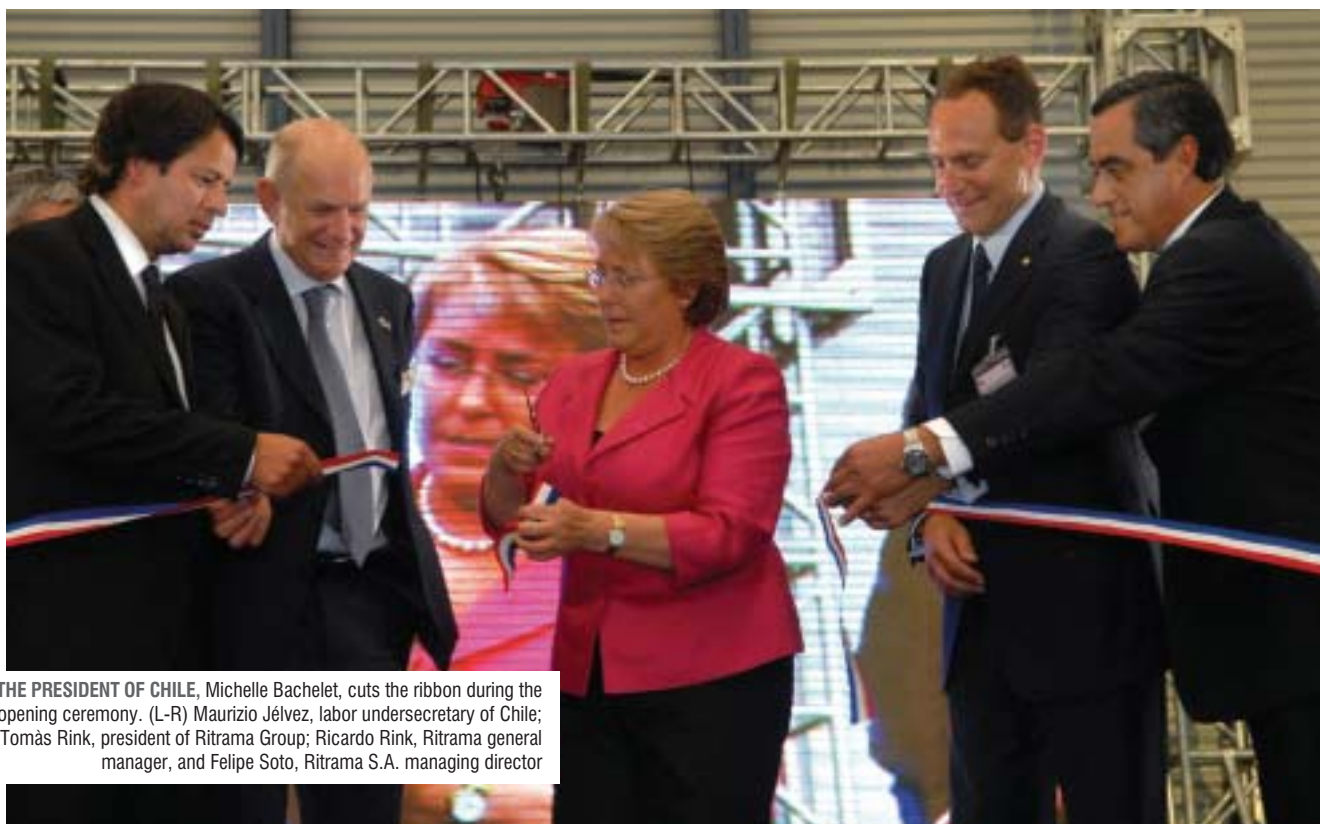
FINAT - through its Membership Campaign - has introduced a Young Managers’ Club which will prepare the industry for a new generation in the 21st Century. **Why not join our network and become an industry member?**

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THE PRESIDENT OF CHILE, Michelle Bachelet, cuts the ribbon during the opening ceremony. (L-R) Maurizio Jélvez, labor undersecretary of Chile; Tomàs Rink, president of Ritrama Group; Ricardo Rink, Ritrama general manager, and Felipe Soto, Ritrama S.A. managing director

Ritrama commissions coater in Chile

RITRAMA has inaugurated a state-of-the art coater in Chile designed to service the Americas with its full range of advance paper and film laminates. Andy Thomas reports

Ritrama is increasing its presence in one of the world's fastest label markets with the opening of a USD \$20 million coating plant in Chile and the establishment of Ritrama S.A - Chile.

With the opening of the Chilean plant – and a Chinese plant to follow later this year – Ritrama now claims to be the biggest privately-owned labelstock manufacturer in the world. It employs more than 750 people globally, and runs coating plants in the United States, Italy, the United Kingdom and Spain.

The 25,000 square meter Ritrama S.A. facility is located in the city of Curauma in the Valparaíso region of central Chile, 120 km (74 miles) to the northwest of the capital Santiago and well connected with a modern toll road. The port of Valparaíso is an important hub for shipping of container freight.

The state-of-the-art coater, supplied by Pagendern, is designed to produce materials to the same specifications as Ritrama's other global plants. 'Global brand owners in South America now want the same quality and specifications as in Europe,' explains Felipe Soto, Ritrama S.A. managing director.

With line speeds up to 500 meters/minute, it can coat a variety of paper and film products, and will have an annual capacity of 200 million square meters. Ritrama says that the plant will specialize in customizing products for local markets.

The importance of the plant to the Chilean economy was demonstrated by the presence at the opening of a high ranking government delegation, including Chilean president Michelle Bachelet, who cut the tape on the new factory.

But the opening ceremony was also very much a family

affair. Ritrama president Tomàs (Tom) Rink represented the second generation of the Rink family. Also present were his sons Ricardo and Ronald Rink, who run the company on a day-to-day basis. Tom Rink said the seeds of Ritrama's Latin American investment were planted with the arrival from Austria of his grandfather, Arnold Rink in Venezuela in 1940. Tom was born in Venezuela and retained his early affection for this part of the world. Ritrama has been actively selling label materials in Latin America for the last ten years, operating both through agents and direct sales organizations, including a joint venture operation in Mexico.





CHILEAN president Michelle Bachelet visits Ritrama's new coating plant

WHY CHILE?

Why did Ritrama choose Chile for its Latin American base? 'Clearly we want to establish ourselves in Latin America by benefiting from local costs,' said Tom Rink. 'At the same time, we have been convinced by the free trade agreements that Chile has with regional countries, as well as its political stability and future projections of economic development.'

Key factors include Chile's strong domestic consumer market and export-oriented food and wine sectors. Pressure sensitive wine labels alone are growing at 14-15 percent a year, for example, mostly going to export. At the same time, Chile's 'cultural and financial open-mindedness' make it an excellent export base, said Rink.

The Chilean government has been very supportive, added Rink, supporting feasibility studies, investment analysis and training. There are three local universities turning out good engineers and the workforce is young and highly motivated.

For Chilean converters the Curauma plant will mean Ritrama can deliver just-in-time and they will no longer be impacted by fluctuating dollar exchange rates. The plant is also a key base to export film and paper laminates to the rest of Latin and South America, supported by slitting centers in Peru, Mexico, Argentina and Brazil.

North America is another key target market for the plant. Ritrama has appointed a new US vice president, Christopher Paskey, who will be based at the company's US headquarters in Cleveland. Ritrama recently invested in two new 2 meter-wide slitters at the Cleveland DC.

CONVERTER GATHERING

An impressive list of key regional label converters attended the opening of Ritrama's Chilean plant. Logotex, one of Peru's biggest printers, reported that business is growing fast as Peru exploits its unique geography, which means it can grow food for export all year round in multiple climate zones. Prime and VIP label growth rates are currently around 15 percent a year, albeit from a low base.

Daniel Varsky of Adhepel, a leading printer of wine labels in Buenos Aires in Argentina, said the new plant will offer Latin American converters a choice of local high quality materials suppliers. 'It will also allow us to get new business in textured papers and films which are being used more and more in wine. Film is being used particularly for white wines and cava, and we see particular growth in clear-on-clear in new white wine varieties.'

Sandra Bril, president of Ritrama distributor Sacomex, said the new plant 'provides a great opportunity to service customers with new products which were not previously available in this region. The price is competitive and now logistics are easier. And this is a strong market. Narrow web labels growing at 10 percent a year average across the Latin American region.'

Other converters seen at the event included Venezuela's biggest converter Conti ex, Imprimex from Uruguay, Adhepel and Achnar from Argentina and CCL Brasil and Indemetal from Brasil. Also very important Ritrama Distributors present in the event were Mextran and Multimarc from Mexico, CMY from Brasil, Digi exo from Costa Rica, Sudigraf from Colombia, Pattern and Sacomex from Argentina and Barley from Uruguay.

The opening of the new coater was followed by a gala dinner and a wine tasting evening at the famed Indomitable vineyard, as well as visit to a typical Chilean rodeo.

HIGHLIGHTS

MAKE SURE YOU DON'T FLICK PAST ANY OF THIS LOT!

54 THE PAPER CHAIN

The choice of material is a crucial aspect of wine label design which influences the printing process, a brand's identity and the consumer's purchasing decision



62 AUSTRIAN PIONEER POINTS THE WAY

Following an extensive investment program, Marzek Etiketten looks set to become a major player in Central and Eastern Europe



88 WHEN PERFORMANCE MATTERS

Faced by some major challenges, film manufacturers have introduced a series of high performance products. Barry Hunt examines the key developments



97 RECRUITING EXPERIENCED FLEXO OPERATORS

With worries over recruiting trained press operators regularly topping L&L global surveys, a report on the experiences of a leading recruiting specialist in North America





All change in the Chilean wine label market

YORK LABEL made headlines when it bought up a large part of the Chilean wine label market in a series of swift acquisitions. James Quirk reports on the effects on the local industry

The history of the Chilean wine label market has in recent years been irrevocably shaped by the influence of two major North American converting groups – Cameo Crafts, of Canada, and York Label of the United States.

When the Chilean wine export market exploded in the nineties, its local converter base did not have the technology at its disposal to produce labels of the required quality. This began to change, however, when Cameo Crafts entered into a joint venture with Marinetti Packaging, the leading Chilean producer of packaging and cartons, in 2002.

In 2007, the Canadian group was purchased by York Label in a deal which brought 50 percent of the Cameo Marinetti joint venture under the US company's control. In line with the aggressive program of expansion that has seen it make headlines in recent years, York soon swooped again:

LABELS&LABELING

acquiring wine label converter Etiprak and then securing the remaining half of Cameo Marinetti, which brought with it a 50 percent stake in another local converter, Etiquetas Industriales. In a twelve month period, York Label had created the single largest label producer in Chile.

"Some vineyards were happy at this development. At others, there was opposition. But essentially the people at York and Cameo have helped the whole Chilean market to change and grow"

'The speed of decisions was the biggest culture shock,' recalls Aldo Gonzalez, general manager of Cameo Marinetti. 'We had our first formal board meeting in November 2007. We covered the usual

agenda, and then he asked us for an "optimistic" view of the next five years. We identified the purchase of Etiprak, then our main competitor, as something that would be interesting to look into in the future. One week later the board rang me and said "go ahead".'

FOREIGN INFLUENCE

The Chilean wine market is something of an anomaly. Usually, the country of origin will label a bottle for export in the same language and with the same legal information irrespective of where that wine will ultimately be consumed. In Chile, however, all this variable data is handled by local label converters prior to export.

'French vineyards, for example, often don't worry about whether people in other countries can understand the information on a wine label,' explains Aldo Gonzalez. 'Some say it's not



necessary, or that you lose a little glamour or authenticity by tailoring the information to different markets. But this differentiation is an advantage for Chilean wine. The vineyards here are not arrogant enough to assume that the rest of the world knows all about them.'

The result of this philosophy is a vast quantity of different SKUs and an increased importance in having an efficient supply chain. Here, the arrival of York Label has helped: the company sends staff to the vineyards to check the SKUs and monitor efficiency. 'Some vineyards were happy at this development,' says Gonzalez. 'At others, there was opposition. But essentially the people at York and Cameo have helped

the whole Chilean market to change and grow.'

Technical staff are regularly sent to Chile from the US and Canada to review processes and oversee product launches, which Gonzalez describes as 'a very useful influence'.

He cites as an example that scuffing had been an issue in the Chilean label market – a problem solved with support from Cameo Crafts.

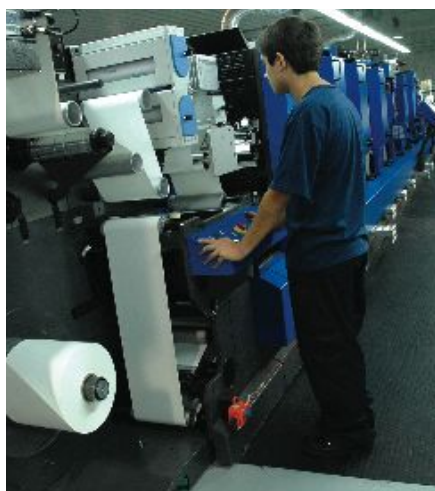
'The arrival of York brought visibility to the market,' says Gonzalez. 'Previously, only three different papers were used on 80 percent of Chilean wine labels. These were the ones which the distributors were promoting. But York said: there are 2,000 label papers in the world, choose

THE FICKLE CONSUMER

Consumers can be faced with a dizzying array of products when shopping – 4,000 different labels at a liquor store and over 100,000 at a supermarket is common – so differentiation and eye-catching design play a crucial role at the point of purchase.

When it comes to wine, only three percent of buyers are connoisseurs: the overwhelming majority will flit between brands with little loyalty.

Studies show that the consumer's eyes flicker across shelves at speeds of 110 kilometers an hour, while one in four products that is touched is purchased.



CAMEO MARINETTI'S FACILITY is divided into separate sections for pressure-sensitive and wet-glue label production, for which it uses presses from Gallus and Heidelberg respectively

HERNAN VEGA (left) and Juan Pablo Toso of Etiprak flank Cameo Marinetti's Aldo Gonzalez



TIMELINE

NOVEMBER 2002	Joint venture between Cameo Crafts and Marinetti Packaging
AUGUST 2007	York Label acquires Cameo Crafts; the deal brings with it 50 percent of Cameo Marinetti
MARCH 2008	York Label buys Etiprak
AUGUST 2008	York purchases final 50 percent of Cameo Marinetti, now owning it outright

what you want.'

Supply chain efficiency has been greatly enhanced, with shorter production runs and lead times, thanks to new 'logistics fulfillment indexes', described by Gonzalez as 'an important part of the culture change.'

'Every job has to be treated the same,' says Aldo aGonzalez. 'Sometimes a company will fail to fulfill a delivery time on short runs because they prefer to focus on longer runs. For us, one event is one event.'

FROM COMPETITORS TO COLLEAGUES

Cameo Marinetti, with its background in offset printing, and Etiprak, traditionally a flexo house, complement each other well.

The Cameo Marinetti facility is divided into two sections: pressure-sensitive and wet-glue label production. The former houses two Gallus TCS 250 offset presses, of six and seven colors respectively, with two hot stamping units, one flexo unit – which prints its color on top of the stamping – and embossing and die-cutting. The 7-color machine is

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CAMEO MARINETTI'S facility is located in Santiago, Chile



L-R: Aldo Gonzalez, managing director of Cameo Marinetti, with sales manager Francisco Bardi

"Now the advice can be truly impartial because we can offer both processes to the client. It has therefore also been an advantage to our customers"

also equipped with a silkscreen unit. Overprinters handle the large percentage of labels that require additional converting, while finishing equipment comes from Newfoil and Rotoflex. The wet-glue section is made up of four Heidelberg presses and four hot stamping machines from Gietz.

Etiprak, meanwhile, has invested in new technology and diversified its product offering since L&L visited it in late 2006. Formerly a dedicated wine label printer with three FA-3300 presses from Nilpeter, the company shifted 35 percent of its production to consumer products prior to its acquisition. An

8-color Nilpeter FA-4 press and a machine from Karville, which also die-cuts and rewinds, were brought in to provide shrink sleeve capabilities.

'All this new equipment gave us the potential to target consumer products,' says production manager Hernán Vega. 'Shrink sleeve labeling is a growing area in Chile and the new technology has allowed us to produce new lines of products.'

Since the acquisition, Etiprak has benefited from an influx of machinery from the Etiquetas Industriales plant, which had been installed in the past at Marinetti Packaging's facility: two Mark Andy presses – a 4150 with six colors and UV varnishing, and a 910, used for simple products of one to three colors – as well as two hot foiling machines and finishing equipment from Rotoflex and Arpeco. The new presses have allowed the Nilpeter machines to concentrate on value-added labels, and

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STEPHAN Finke, technical director of Cameo's California operation, lends his expertise

Vega reports a 15 percent increase in productivity.

'It has been an interesting venture,' says Vega of the acquisition of Etiprak. 'We complement each other well with the technology at our disposal, and we can move jobs between plants depending on which equipment is better suited.'

'Before, we'd fight over a client, saying it would be better handled by offset, or by flexo,' echoes Gonzalez. 'Now the advice can be truly impartial because we can offer both processes to the client. It has therefore also been an advantage to

our customers.

'Etiprak had more experience in offline stamping and foiling, while at Cameo Marinetti it was all inline. It's a positive mix.'

Indeed, at the time of the initial joint venture in 2002, Cameo Marinetti has a one percent share of the Chilean wine label market. Six years later, with York Label overhead and Etiprak by its side, that figure had leapt to 50 percent.

'The mix between Cameo and Marinetti was good,' says Gonzalez. 'But the mix with York is even better.'

THE GRAPHIC DESIGNER'S PERSPECTIVE

Matias del Rio has witnessed the evolution of the Chilean wine label industry through his graphic design company Del Río Diseño, which is exclusively dedicated to branding and packaging.

'The change has been radical in the years since Cameo Craft entered the market,' says del Río. 'The advance in technology has opened up so many possibilities, and the development of the converters has been revolutionary for us. We work closely with the converter to maximize what we can get out of the technology.'

'We can test our designs at Cameo Marinetti to see how they turn out. It's one thing to design something on a computer, but quite another for it to go through the printing process. It's a big advantage to know, during the design planning, which printing process the product will go through; whether it will be flexo or offset, for example.'

'Cameo Marinetti's flexibility allows us to use a machine for half an hour, and it brings such benefits to us. Usually only minor changes, if any, would be made at this stage, but it's better than printing the whole job and realizing the design needs to change.'

For del Río, one of the main challenges is to create a design which will appeal to a number of different cultures. A product will often be sold in multiple markets, all of which must be catered to by the design.

'The distributor or the client will provide information about what the principle market requires,' he says. 'It's usually not very detailed, but will outline that market's habits and trends. Much will also depend on the product itself: a high-quality wine will have a more refined market – a



MATIAS DEL RÍO of graphic design company Del Río Diseño, which is dedicated to branding and packaging

customer who travels and who may understand certain references which a consumer of a cheaper bottle might not.

'Cultural differences therefore play an important part. The UK market, for example, requires a less obvious message than the rest of Europe: you don't need to spoon feed the customer.'

HOT OFF THE PRESS

A ROUND-UP OF THE LATEST GLOBAL LABEL STORIES

GOMBAU LAUNCHES SYNTHETIC CARE FILM RANGE

Spanish material manufacturer Gombau has launched its Synthetic Care range of self-adhesive filmic labelstocks.

Combined with a UV-curable adhesive, the range is said to show excellent transparency, which makes it suited to the 'no label look' frequently seen on beverages.

The GSP13 and GSP16 adhesives withstand moisture, pasteurization and sterilization – often requested, for example, on pre-labeled beer bottles – so whitening is no longer a problem.

Gombau's product portfolio for beverage labels includes super-clear, white and metallized OPP films. Customers can choose the right material to achieve the most effective branding for soft drinks, milk, fruit juice, mineral water and other flavored beverages.

Gombau Group also offer thin films for overlaminated 'no-label look' labels, enabling customers to obtain superb transparency and high print protection against scratching and grazing. The company says that high labeling speeds are not an issue as the products have been targeted to meet this demand.

ERHARDT+LEIMER CELEBRATES 90TH ANNIVERSARY

Germany-based Erhardt+Leimer celebrates its 90th anniversary this year. The company was founded in 1919 by Manfred Erhardt for the repair and service of industrial clocks.

Albert Leimer joined the company in 1923 and over the next 20 years transformed the company into a supplier of measuring and control equipment for the thriving local textile industry.

Over the following decades, Erhardt+Leimer expanded its activities to other sectors such as the paper, printing, tire, film and foil industries.

The company's key competences today are in automation, visualization and inspection of all processes which occur in any web converting industry.

Erhardt+Leimer has a staff of 420 at its headquarters in Augsburg. About 650 people are employed worldwide in subsidiaries and service stations established in all major industrialized countries. Erhardt+Leimer is a third-generation, family-owned and family-run enterprise.

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Charles Darwin

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The **paper** chain

THE CHOICE OF MATERIAL is a crucial aspect of wine label design which influences the printing process, a brand's identity and the consumer's purchasing decision. James Quirk travels to Spain to talk to specialty material manufacturer Manter, wine label converter Vidal Armadans and graphic designer Morera Design

The Spanish word *papel* means both *paper* and *role* – a linguistic idiosyncrasy which aptly reflects the vital part played by material in graphic design. In the wine sector, where leading brands traditionally spend less money on advertising than other alcoholic beverages such as beer and spirits, the label plays a crucial role at point of purchase. More than merely a vehicle for imagery and information, the material used can form part of a brand's identity.

The cooperation between material supplier, converter and graphic designer is therefore fundamental at every stage of a label's inception and creation, as is demonstrated by the relationship between Girona-based specialty material manufacturer Manter, part of the Fedrigoni Group, beverage label converter Vidal Armadans and graphic designer Morera Design, both located in Barcelona.

THE GRAPHIC DESIGNER

Morera Design, housed in a beautiful 19th century building in the center of the city, is one of Spain's leading graphic designers. Prior to founding the company in 1991, CEO Josep Morera spent over ten years working with the French group Shining Strategic Design, focused on corporate branding. Morera Design is dedicated to packaging, which Morera believes offers greater scope for creativity, and has won a multitude of awards since its inception both at home and abroad. His work for the Roberto Verino fragrance forms part of a permanent collection in the Louvre Museum in Paris, while other clients include Nestle, Dewar's whisky and Raimat wine.

'In recent years, looking to differentiate, I've started specializing in premium brands,' says Josep Morera. 'While mass-market products cater to basic needs, premium ones provoke a more intangible emotion – the concept of the



customer's desire to buy a particular product.

'I'm very interested in the art of communication and creative expression. My specialty is in good communication, which is the key to selling a product. As touch plays an important part in the emotions of buying a product, so the material plays a crucial role.'

Morera works closely with the label converter to learn what papers are available, and what their capabilities are. 'My education at Barcelona's leading design school focused on practicality. So at the beginning of a project, I try to incorporate the industrial process into my thinking. When I present my final creative concept, I will already know exactly how it can be printed, with how many colors, so I can guarantee that the end result is the same. This knowledge helps the creative process – if you know the industry, you gain a lot of creativity.'

Morera's creative ideas will sometimes dictate the choice of material, but the material itself can also lead to ideas. 'My personal method for working is to start with the concept of a trend. I have a box which I fill with random objects which can bring me inspiration. These can include papers, so I always like to receive product catalogues from a company like Manter. The paper can be a good source of inspiration: materials have their own language which they bring to the project; when you decide what you want to say, you need to know what language to say it in – the texture and color of the material, for example. The choice of paper depends on what you want to communicate.'

'Above all, the catalogue has to be practical to use – with examples and a wide range of products. There also has



JOSEP Morera, founder and CEO of Morera Design, believes that material plays a crucial role in label design

"My specialty is in good communication, which is the key to selling a product. As touch plays an important part in the emotions of buying a product, so the material plays a crucial role"

to functionality: you have to be sure that the paper will handle the processes it will go through, the stamping etc, and Manter's catalogues fulfill this role. They always have something to discover which I hadn't thought about before.'

Over half of Morera Design's work is for the beverage sector, with the remainder divided between food packaging and cosmetics. Of this beverage work, 90 percent is for Spanish brands; much of the company's cosmetic work goes to Dubai and other parts of the Middle East.

THE LABEL CONVERTER AND MATERIAL SUPPLIER

Since its foundation in 1944, Manter has worked closely with Vidal Armadans, a converter founded in 1898 and well-known in Spain for high quality beverage labeling.

The relationship, which is replicated with many of the company's converter customers, allows Manter to test its materials on Vidal Armadans' equipment. 'When we launch a new range, we send the products to converters for feedback,' explains Juan Gil, Manter's director of marketing and national sales. 'It's like launching a fashion collection: the market absorbs the products it likes and discards the ones it doesn't. The best survive, so with each range launched we enrich the market.'

'Vidal Armadans allows us to test our products and see their ability, and it's a company which has very good relationships with designers. The technology that it has at its disposal is best suited to product ranges like ours.'

In this way, Vidal Armadans acts as a go-between for material supplier and graphic designer: Manter comes to test its materials; Morera Design comes to test its designs and see the final product.

'The end-user often has no idea of the printing process,' says



L-R: Christian Gali, Manter; Javier Martínez Jeremías, Vidal Armadans; and Juan Gil, Manter



Juan Armadans Vidal, the company's CEO. 'So they leave it to the graphic designer to liaise with us.'

Vidal Armadans is dedicated exclusively to the beverage sector and concentrates on premium products such as wine and champagne. Its clients include some of the top vineyards in Spain and France; one Spanish wine, Pingus, fetches up to 1,000 euros a bottle in restaurants.

This dedication to quality brands is well-matched by Manter's philosophy of creating materials for just such markets: Vidal Armadans uses Manter's materials in 80 percent of all its wine labeling.

'Papers for wine labels have to have added value,' says Juan Armadans Vidal. 'Manter provides materials specifically for the sector in which we work.'

Manter launched its Savile Row range of papers at Labelexpo Europe 2007. Interviewed by L&L at the time, Juan Gil described it as a 'book of art' and emphasized his desire for the paper to become part of the design itself. It's a philosophy which Juan Armadans Vidal agrees with. 'I educate all the 150 designers we work with about the advantages of the different papers available. There are so many possibilities. An advantage that Morera Design has, compared to others we work with, is the attention it pays not only to the aesthetics of the design, but to this functionality.' As a demonstration, the converter has a montage of the same label, printed the same way, but on a variety of different papers. The variance in the results is plain to see, and emphasizes the impact that different materials can make to the designer.

'Self-adhesive materials give more options for branding in comparison to others,' says Juan Gil. '...and more technical precision,' echoes Juan Armadans Vidal.

Vidal Armadans operates one shift in its 1,000 square meter factory in central Barcelona. Its location facilitates its relationship with designers: 'they can cycle to us,' says technical director Javier Martínez Jeremías.

The converter has an array of machinery at its disposal: a 5-color sheet-fed offset press from Sakurai; a 5-color letterpress machine from AB

"When we launch a new range, we send the products to converters for feedback. It's like launching a fashion collection: the market absorbs the products it likes and discards the ones it doesn't. The best survive, so with each range launched we enrich the market"

Lintec, equipped with flexo units at each end of the press and a stamping unit; a 5-color Gallus T250 letterpress with stamping and a flexo unit for varnishing; a Gallus TCS 250 roll-fed offset press with 5-colors and stamping, silkscreen and flexo units; as well as stamping machines from Heidelberg and slitting machines from Lombardi.

The cooperation between the three companies demonstrates the important part played by the material in the design and production of a label, and emphasizes the advantages of good communication between designer and converter. As Manter's Juan Gil says: 'It might be the converter that buys the products, but the designer is the doctor who prescribes them.'

MANTER APPOINTS WELDON CELLOPLAST AS AGENT IN INDIA

Manter, the Spanish manufacturer of self-adhesive materials, and part of Fedrigoni Group, has appointed Weldon Celloplast as its representative in India, Pakistan, Bangladesh, Nepal, UAE and Sri Lanka.

'We are happy to join forces with Weldon Celloplast, and we look forward to a solid business relationship,' said Pere Espelt, commercial manager of Manter.

'Industry in India increasingly demands more and improved leading edge solutions. Our self-adhesive collections are composed by an extensive range of papers, film and adhesives that provide for all the requirements of the most demanding and specialized sectors,' added Christian Galí, export area manager of Manter.

Harveer Sahni, managing director of Weldon Celloplast, said: 'Our association with Manter will bring to the Indian label printers a range that is extremely vibrant. The wine and Gourmet labeling range brings with it exciting opportunities especially in high-end premium retail labels segment. We look forward to a fruitful relationship with Manter.'

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Offset and the wine producer

AT a recent Gallus-sponsored open day at Akian Gráfica Editora showcasing the TCS-250 press, Jennifer Dochstader found out more about the machine's role in the burgeoning Argentinean wine industry

More than 1,200 wineries dot the Argentinean landscape; most of them tucked beneath the spine of the Andes Mountains framing the country's western border. As one of the top five wine producing regions in the world, along with France, the United States, Australia and Chile, Argentina exports nearly half a billion dollars annually of wine and grape juice concentrates. Currently Argentina's wine industry is witnessing revitalization on an unprecedented scale. Local entrepreneurs are being joined by renowned conglomerates and vintners from Europe and the United States in bringing the latest winemaking techniques to this unique region of the southern hemisphere.

The Argentinean economic market has been a volatile one over the course of the past decade. Ending an era of GDP growth and foreign investment throughout the 1990s, the economy all but collapsed, beginning its downward spiral in 1999. For the next three years Argentina's economy suffered rising unemployment rates, the flight of foreign investors, double digit inflation and a sharp currency devaluation for the Argentinean peso.

Slowly, Argentina restructured its financial system and the country's economy began to turn around. Yet as damaging as the crisis was to the Argentinean economy, it was also a critical catalyst for the country's packaging industry. Prior to the crisis, Argentina was importing vast quantities of packaged products. Cosmetics, pharmaceuticals, even food and beverage products – goods were manufactured abroad or across borders and arrived into Argentina packaged, and labeled.

As the country's credit rating plunged during the economic crisis, the volume of imported packaged goods declined significantly; countries exporting goods to Argentina were concerned about payments defaulting. Argentina's retail sector suddenly found itself in a situation where store shelves were only going to fill up if the companies manufacturing, bottling and labeling products for those shelves were Argentinean. As packaged goods were increasingly sourced from within the country's own borders, the narrow web label-printing industry witnessed a tremendous expansion in the production of high quality graphics. While the pressure sensitive labeling sector was entering new territory, the local wine economy was rapidly expanding as Argentina began to carve out a niche for itself as



VISITORS gather at Akian Grafica's Open House in Buenos Aires, Argentina

a global contender in the production of fine wines. Once the economy began stabilizing, wine exports rose and vineyards sought more flexible and cost effective bottle decoration methods. As a result, wet-glue labels were increasingly replaced by pressure sensitive.

Flavio Damiani, product manager in Argentina of Gallus' South American agency, Hagraf, says the pressure sensitive wine labeling sector in Argentina is an expanding one, with PS labels comprising nearly 40 percent of the total wine market and wet-glue still commanding the lion's share. Average run sizes are decreasing in this sector as quality levels rise.

'There's a reason run sizes are decreasing,' Damiani explains. 'More and more wine producers are adopting promotional marketing strategies which equates to the need for higher quality labels and shorter run size requirements. Let's say a vineyard wants to promote a certain varietal, or have a sports team or special group referenced on a label – these are going to be very short run sizes and extremely high quality standards.'

Damiani says the Gallus TCS 250 has proven ideal for these applications. 'Within half a decade we have installed a high number of Gallus TCS 250 presses in the market. For the most part, the companies who are buying these machines were traditional sheetfed glue-applied label printers. They began with Heidelberg machines and suddenly the market started pushing them to deliver pressure sensitive labels so they

started to look into what was available. Offset is a critical print process for these companies since these label designs are of the highest quality graphic standard and run sizes are small – usually under 100,000 units, so the Gallus TCS 250 is the ideal machine for this market. The machines that have been installed so far are offset UV with screen, hot stamping and embossing capabilities.'

THINKING OUTSIDE THE BOX

Over the past half decade as the number of installed Gallus TCS 250 press systems grew in Argentina, one converting company outside the wine industry was paying very close attention. Akian Gráfica Editora is one of the highest quality converting companies in Argentina. Historically a sheetfed offset company, Akian made their foray into the pressure sensitive label-producing sector more than a decade ago with the purchase of a Gallus R200 letterpress system. At the beginning of this year, the company installed a Gallus TCS 250. Akian vice president, Claudia Akian, comments on the company's strategy with the acquisition of their new press: 'We bought this machine first and foremost because it's offset and offset is still one of the highest quality printing processes. Secondly, we purchased the machine because we have a printing company devoted to quality and this machine is for high quality short runs, which is our specific niche in the market. We watched as Gallus focused on the wine market for this machine and

we started thinking to ourselves – this machine isn't just for the wine market. This machine is for any company that wants short run, highest quality printing.'

To promote the arrival of their new press Akian held an open house. Packaging designers from South American cosmetics, pharmaceutical, wine and food companies attended the event, co-hosted by Hagraf Argentina and Gallus. Designers and label sourcing personnel were able to view the machine running in addition to witnessing the short setup and make-ready times integral to the Gallus TCS 250's design. 'This is a very versatile machine,' Akian continues. 'It has allowed our designers to let their imagination flow.'

Over the course of the past decade, self-sufficiency has brought the Argentinean packaging industry to quality and efficiency levels unprecedented in the nation's history. At the same time, state-of-the-art wine-making technology and entrepreneurial vintners have brought standards in the country's wine sector up to where it rivals the world's top producing regions. This in turn has created great opportunities for which semi-rotary offset has proven well suited.

ABOUT THE AUTHOR

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INSTALLATIONS



GRAFICON RT350 booklet machine



SMAG Galaxie at Germark

GRAFICON

RT350 BOOKLET MACHINE

Graficon Maschinenbau AG has delivered a Graficon RT 350 booklet machine – with the ability to produce large-size booklet labels – to a customer which already has two T 200 booklet machines.

Graficon's Martin Erni reports strong growth in the booklet-label market, driven by increasing requirements for more information on smaller spaces, increased promotional and marketing activities by multinational brands, the drive to reduce packaging materials and the requirements of product liability / safety information.

As well as its dedicated booklet-label machines, Graficon also provides an inline module for the Gallus R 160/200.

BOPACK LABELS

CERM MIS

Bopack Labels, a division of the European Bopack group, has successfully implemented MIS from Cerm at a second production plant in France.

At the start of 2007, the management of Bopack decided to streamline the workflow of the six facilities in the Bopack group through the use of Cerm software. At the end of 2008, Cerm was started up on an operational level in two French subsidiaries. The software will also be deployed at the other European sites at a rate of two companies per year.

Mark Boehlen, CEO at Bopack Group, stated: 'The level of software and the consultants' expertise are extraordinary. The additions that proved necessary are incorporated into the standard package and made available to all of their customers. No more tailor-made software or proprietary developments, but standardization, regardless of the

company size.

'Cerm convinced us, both from a user-friendliness and performance point of view, that the software would manage to support the versatility of our manufacturing equipment. Well then, the results are remarkable. Cerm is without doubt the right partner, and thanks to their knowledge and expertise in the field of label activities, they clearly give Bopack added value.'

LA MODULISTICA SANKI OFFSET PRESS

After a successful world preview during Labelexpo Europe 2007, Sanki has announced the first European sale of its SOF semi-rotary wet offset press to converter La Modulistica, located in the wine growing region of Piemonte, Italy.

The press will be mainly dedicated to wine label production, where average run length is around 5,000 labels per job, and the requirement is for minimum start-up times and low waste and the ability to print on antique paper in combination with hot foil and screen. The press can be run by a single operator.

The Sanki SOF press has a compact footprint at 6.80 meters long, a web width up to 330mm and 254mm maximum repeat length. It is equipped with a one-size universal blanket and quick change plate system, and GEW E-Brick 200W UV lamps.

Installation, training and technical support for the Sanki offset machine were provided by Gabriele Gerbella, agent for Lintec/Sanki in Italy. Sanki has been manufacturing label presses in Osaka since 1958, and is now distributing its SOF offset press worldwide with the technical and commercial support of Lintec, following the signing of a joint venture agreement between the two press manufacturers.

GERMARK

HP INDIGO AND SMAG GALAXIE

When HP Indigo and Smag welcomed an international group of prospective customers to Barcelona, they bussed everyone off to visit two of the local label converters, writes *John Penhallow*. One of them was Germark, one of the biggest narrow web printers in Spain.

CEO Iban Cid said: 'Our customers are all asking for reduced time to market, just-in-time deliveries and of course shorter and shorter runs, and this is what digital is tailor-made to do'.

For its finishing line Germark chose a Digital Galaxie from HP-approved partner Smag with flat bed screen printing and semi-rotary foiling, varnishing and die-cutting. Germark now uses the duo ws4050+ Galaxie to offer what it calls 'Etiqueta Express': this special service offers customers a limited choice of labelstocks, digital printing and standardized dies, and of course super-fast delivery. 'We still offer all our standard program,' says Iban Cid, 'but the 48-hour service has brought us new business and cemented our relations with our more long-standing customers. This latest investment in HP and Smag equipment is an essential part of our search for better service and profitability'.

Commenting on the Germark installation, Stéphane Rateau, president of Smag said, 'Our close cooperation with HP Indigo means that there is a seamless synergy between HP digital printing and Smag finishing equipment. Each Smag Galaxie has the advantage of being able to operate either off-line or on-line using our special connecting module. Over the years Smag has delivered more than one hundred Galaxies to customers throughout the world'. Smag Graphique is represented in Spain by Imprimya BIEQ.



AS a service to smaller vineyards, Marzek offers a wide range of pre-printed label backgrounds

Austrian pioneer points the way

FOLLOWING an extensive investment program which includes Europe's first Rotatek Brava press and state-of-the-art pre-press, Marzek Etiketten looks set to become a major player in Central and Eastern Europe. Andy Thomas reports

Few label converters can claim a history to match that of Marzek-Etiketten. Founded in Vienna in 1879 by Karl Marzek 1 – and still owned by the same family – the company pioneered pressure-sensitive labels in Austria, installing the country's first Gallus rotary letterpress in 1965.

With a turnover of 40M euro, Marzek is Austria's largest label printer, employing 360 people in two plants in Austria and Hungary. The company deploys 120 printing units across the full range of print processes, including sheetfed and rotary offset, UV flexo, letterpress and screen, and converts a wide range of packaging and label products. A digital print capability is currently under consideration.

Marzek has used its strategic central European location to expand into the growing markets of Eastern Europe, establishing a profitable joint venture carton business in Ukraine in 2002, then acquiring Hungarian converter Kner Packaging from Mondi in 2005.

'When the East opened up in the 1990s, they needed good quality labels, which were provided by Central European printers like us,' says Dr Johannes Michael Wareka, CEO Marzek. 'Then local printing companies got their own finance plans and started buying Heidelberg's and their know-how improved, and this led to overcapacity. We are making money

LABELS&LABELING

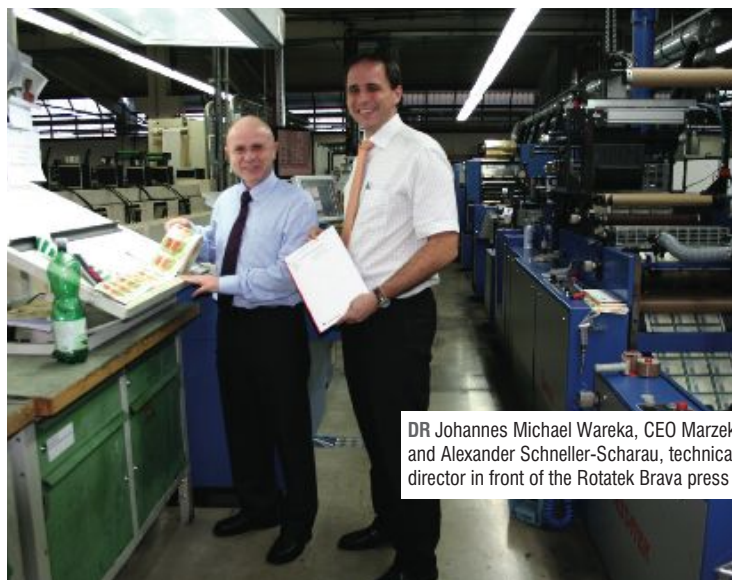
in Hungary with our sheetfed operation because we are located outside Budapest where wages are lower.'

But Dr Wareka believes Hungary still presents big growth opportunities, especially in value added sectors like wine. 'Wine is still sold in bulk and is years behind Western Europe in its marketing and presentation. The Hungarian market is twice as big as Austrian and is already demanding more quality products.' Marzek regularly hosts workshops for Hungarian label designers, bringing them up to date with the latest developments in press and finishing technology.

Having sold its stake in a Ukrainian label joint venture in 2005, Marzek has been looking at an acquisition in the country. A letter of intent has now been signed and the deal should close in February. Marzek is also considering a bold move into the Indian label market.

WINE SPECIALIST

Marzek's main labels operation is perfectly sited at Traiskirchen, in the midst of some of the finest wineries in Austria. Not surprisingly, wine labels account for some 20 percent of the company's business, and Marzek claims to service 70 percent of all Austrian wine producers. Among its hundreds of print awards, Marzek is particularly proud of a World Label Award



DR Johannes Michael Wareka, CEO Marzek and Alexander Schneller-Scharau, technical director in front of the Rotatek Brava press

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Marzek has maintained this dominant position by developing specialist services and products for the wine market. Particularly popular among smaller vineyards are Marzek's pre-printed label backgrounds, designed by the company's in-house team, then imprinted with the wineries' personalized data at a later stage, usually in lots of just a few thousand using conventional flexo machines.

These sophisticated backgrounds can be printed in anything up to 7-colors plus screen, embossing and metallics. 'This service is tailor-made for the wine industry,' says Alexander Schneller-Scharau, technical director at Marzek.

'It means we do not have to sell a 1-color label at a low price, so this is very cost effective.' Marzek's bigger customers have their own bespoke label backgrounds which are provided for over-printing as soon as the alcohol content and quality of the wine are known. Some wineries pay for up to two years-worth of stock, which is called off as necessary.

WINE CARD

Marzek has also patented a multi-function 'Wine Card', which functions as a label, business card and reusable wine pourer. Developed in conjunction with UPM Rafflatac, the 85 x 85 mm PS Wine Card label is produced in individual designs in anything from one to four colors and delivered in sheets or reels. The winemaker applies the label with a standard applicator to the front or back of the bottle, and after two days the Label Card/wine pourer can be removed for use. The Wine Card can be cleaned and reused.

Austrian winery Weingut Leo Hillinger was one of the first Wine Card users, with CEO Gerd Mader noting a 'significant increase in sales,' for bottles incorporating the device.

Marzek is now establishing a global sales and production network for Wine Card, looking for leading wine label converters to produce it under exclusive licenses.

Alexander Schneller-Scharau also notes that the re-usable pouring

BRAVO BRAVA

Marzek installed Rotatek's Brava press – the first in Europe with this state of the art configuration – last June, and since then has been working closely with the manufacturer to fine tune the technology. 'Rotatek is a very service orientated company maybe or because they are not the biggest player,' says Dr Wareka.

The 450mm wide Brava press is configured for UV wet offset, UV flexo, silk screen, hot foil and die cutting units. It can be configured for either semi-rotary or full rotary operation.

'Semi-rotary mode gives us fast changeovers and is good for short and medium runs, as you do not have to change any cassette or sleeve,' comments Alexander Schneller-Scharau. 'It is also very good for longer runs with multiple changes.' Intermittent mode is used primarily for wine labels, which account for 30-40 percent of total press capacity. Production speed is around 50 m/min.

'The higher speed of the Brava press in intermittent mode and the wider web width give us up to 3-4 times the output of the Gallus machines,' says Schneller-Scharau.

The Brava can be changed from intermittent to full rotary mode simply by changing the printing cassettes. Currently, 20-30 percent of jobs on the press are run in rotary mode. 'Rotary is good for long runs of anything from foil laminates to PS labels,' confirms Schneller-Scharau. 'We can print up to the 150 m/min, though realistic production speed is around 120m/min for complex labels.'

Marzek's management is impressed with the Brava's print quality. 'Fundamentally this is a solid machine with great strength and no problems with water balance and tension when the press is speeded up or slowed down,' says Dr Wareka. 'Rotatek has a lot of experience building big offset presses, and has not simply adapted its units from flexo or letterpress like other manufacturers. This gives us color consistency almost like flexo printing.'

The Marzek press is fitted with Eltromat's latest Offcon 4 web control system, which integrates register control, inspection and inking control. A video camera is used to measure 1mm register control marks printed on the web, and the same system controls length and side register of any integrated flexo units and tool stations.

The press is fitted with IST UV dryers and a glueless Vectra turret rewind.

spout has applications beyond the wine sector, for example with oils, spirits and syrup.

TECHNOLOGY

Marzek's historic commitment to wine labels has helped shape the company's choice of printing technology. In 2002 Marzek was the first label converter in Austria to install a Gallus TCS250 semi-rotary offset press, with two more following in 2004-5 and the fourth one in Hungary in 2007. All machines are fitted with screen and embossing. Intermittent machines are ideal for complex wine labels where 50,000 impressions is a good run for a medium sized vintage.

The latest acquisition, also configured for wine label production, is one of the first installations of Rotatek's Brava intermittent/rotary offset press (see boxout). The Brava forms part of a major three-year investment program at Marzek worth over 10m euro.

Other presses in the Traiskirchen plant include a 10-color Omet Multifilm 520 specializing in short runs



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Marzek also runs a hybrid-combination MPS UV flexo press fitted with Vectra turret rewinders – designed again for fully in-line manufacturing –

and a Nilpeter letterpress.

Although Marzek's sheetfed labels business is decreasing as more end users change over to pressure-sensitive labels, sheetfed labels and cartons still account for 35-40 percent of the company's output. 'We can still make money if this business is tackled in the right way,' says Dr Wareka.

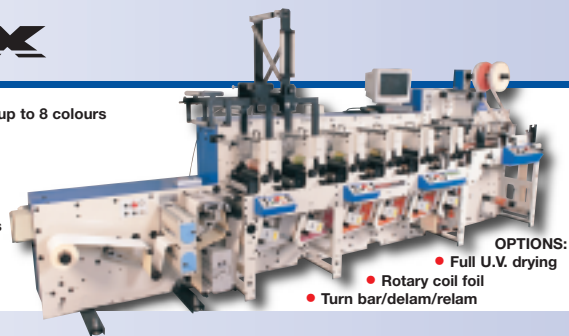
A key sheetfed strategy is to focus on premium products in the wine, beer, spirits, cosmetics and household chemical sectors, using combinations of foil embossing, metallic inks and individualized watermarks.

In a drive to enhance sheetfed efficiency, Marzek has linked its EskoArtworks sheet planning system to the Heidelberg-Polar guillotine, allowing the automatic transfer of cutting profiles. This is one of the first such systems EskoArtwork has implemented.

Marzek has also pioneered the use of EskoArtwork's Visualizer software to demonstrate what different label designs will look like on the bottle and on the shelf before moving to physical production, allowing a high level of interaction with design agency partners.

PROFLEX

- Modular print units enabling 2 colours up to 8 colours
- Available in 2 widths: 250mm & 330mm
- Compact in-line press design
- Maximum press speed: 120m/min
- Constantly rotating ceramic anilox rolls with reverse angle doctor blades
- Automatic plate cylinder throw-off at press stops



OPTIONS:

- Full U.V. drying
- Rotary coil foil
- Turn bar/delam/relam

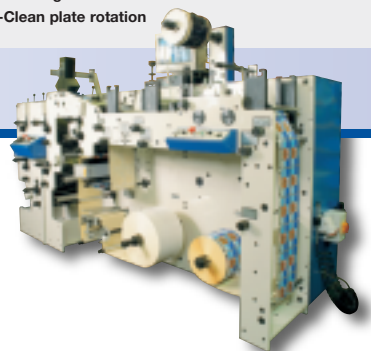
WEBFLEX

- From 2-10 colours, flexographic, rotary screen, rotary cold foil
- Fully modular, in-line flexo printing & converting system
- 13" (330mm) & 17" (430mm) web widths
- Press speeds in excess of 160 metres per minute
- Rapid-Change print system, with Tool-Free print cartridges
- Interchangeable machine ready stations
- Quick-Change impression settings
- Anilox throw off and Self-Clean plate rotation



CENTRAFLEX

- Up to 6 colours, or 5 plus 1
- Compact, multi-colour, flexo printing & converting press
- Central impression design for excellent print registration
- 260mm web width, with 250mm print width
- Press speeds in excess of 70 metres per minute
- Constantly rotating anilox rolls and automatic plate throw off



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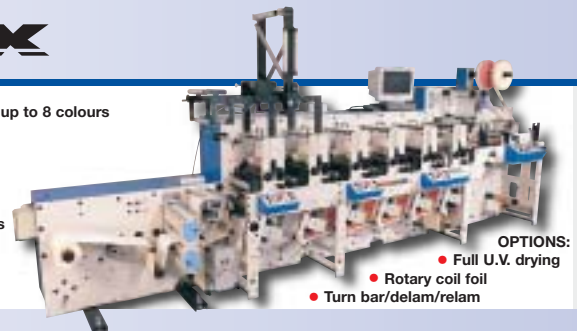
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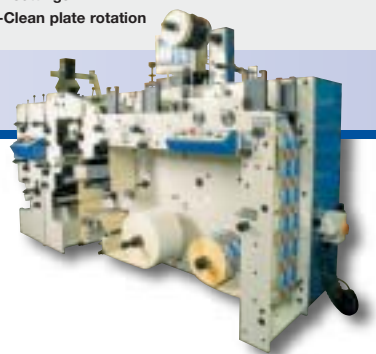
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This continues Marzek's long tradition of pre-press innovation. In 1996 the company installed Austria's first Barco system, and in 1999 launched an on-line digital image library, which today contains more than 50,000 original label files. Clients can download images and technical data in the form of version-managed PDFs, while older images are automatically archived, generating version histories.

Marzek has adopted flexo CTP with an EskoArtwork CDI Spark, and is currently testing JET Aqua-Flex water-wash digital plates. Interestingly, the switch to CTP was

not to improve quality. 'The quality gain of CTP has been overdone,' says Dr Wareka 'It is a little better and more consistent than analog, but there is not a big difference. But we do want to cut film out – especially as we have only one supplier left and he has to buy from Mexico!'

Alongside its printing operations, Marzek has run a label applicator division since 1995 when it acquired Maurer Labelling Technologies. Marzek's label technology division supplies thermal transfer solutions, allowing it to offer a comprehensive advisory and installation service.

BENCHMARKING

Marzek's quality control department reports separately to the company's management, and has succeeded in reducing complaints to an average 0.3 percent on 7,000 jobs a year – most of which were found not to be the company's fault. The Austrian operation is certified to ISO 9001 and to the environmental management standard ISO 14001, which includes a matrix waste disposal program.

Since the acquisition of Kner, an intensive investment program has included not only new technology, but benchmarking for the Hungarian operation to the standards of the Traiskirchen plant. Marzek has a good record of employing apprentices and was recently honored with an award for best family-run business by the local chamber of commerce.



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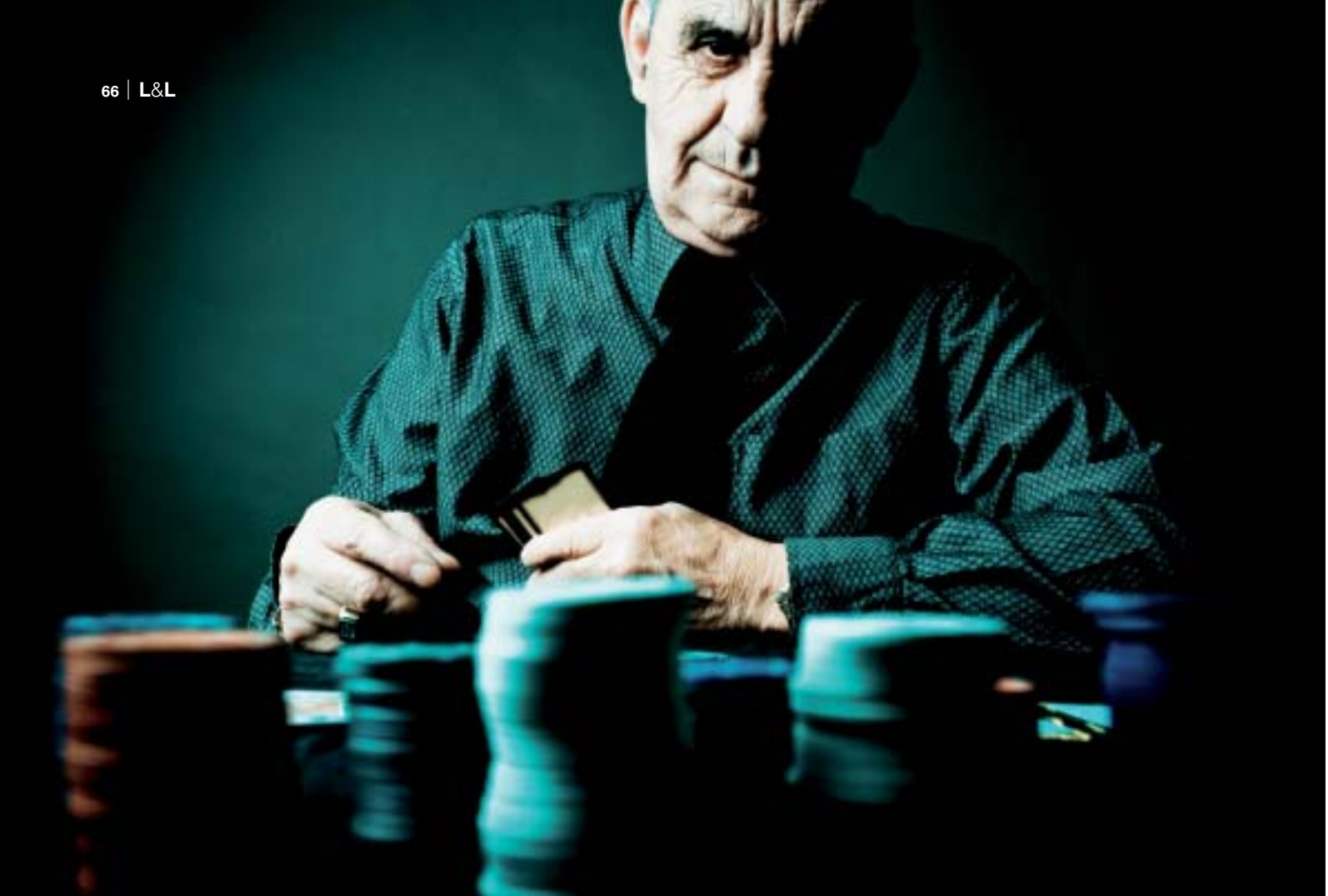
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Why gamble with your success?

DANIELLE JERSCHEFSKE provides an overview of the LPIA Fall Management Conference 2008

The Label Printing Industries of America held its 2008 Annual Fall Management Conference in Las Vegas, Nevada this year. 'Why gamble with your success?' was designed to provide LPIA members with the critical business intelligence a label printer needs to gain competitive advantage. Two action-packed days gave attendees the chance to learn about the global market, hear from a brand owner, and evaluate private equity opportunities. There was even an open discussion about conducting business in China – the dos and don'ts. By the end, members had a lot of information to take home to help improve operations within their companies.

BLACKJACK – BEAT THE DEALER: BRAND OWNER

Ray Toms, a leader for a packaging insights and innovation team for MillerCoors, discussed the importance of a quality manufactured label to the company's brands. 'Innovation is key to growth,' Toms said. In the competitive beer market, it is crucial that a label fits the consumer that MillerCoors is going after with a particular product. Toms

LABELS&LABELING

explained how all his teams' decisions are made with the consumer in mind – and are consumer verified prior to hitting the marketplace.

Perhaps one of the most distinctive labels within the newly merged company is the Coors Light brand color-changing cut-and-stack label. Launched in early 2008, the label is printed with a thermochromatic ink that changes colors, where printed, from white to blue; it's cold activated. When the Rocky Mountains depicted on the label are blue, the consumer knows that the beer is cold enough to consume.

Working as one entity since July 1, together MillerCoors has an extensive brand portfolio using a wide variety of labels. The Miller brand MGD – Miller Genuine Draft – has moved to a clear PS label to stand out from many cut-and-stack labels on competitors' brands. And shrink sleeves have been used by Miller for promotional needs, mostly in specific regions or at a particular event. Toms encouraged his listeners to understand brand attributes in order to connect label technologies to them – creatively.

ALL IN OR BUST?: CHINA

President of Asia marketing and management, James Chan, led a spirited discussion about conducting business in China. Through honest and open interaction, Chan helped his listeners learn more about the Chinese mindset in an effort to help improve business relations and communications between North American and Chinese label printers.

Chan spoke about the giant global brands that have established operations in China and how they are keen to have their labels printed locally. 'Small and mid-sized companies must decide if they want to follow their customers to set up their own business in China,' he said. 'If they don't find you there, they'll create a China-based supplier just like you.'

He said that the real challenge in China is the rising capability of the competition: 'Experienced local printers are moving up the value chain and are investing in top-of-the-line equipment – and they are learning the techniques and skills needed to produce the quality that their customers demand.'

CASH OUT: FINANCIAL AND OPERATIONAL METRICS

Smyth Company's CFO Dave Baumgartner helped the group better understand the math behind what he believes to be the most effective efficiency evaluations and production analysis to manage a successful company. Firstly, Baumgartner illustrated some important equations that executive and management teams should know, such as EBITDA, Funded Debt and Value Added per press hour (VAPPH).

EBITDA is a term for cash flow, or earnings before interest, taxes, debt and amortization. 'This is important,' Baumgartner said, 'because it is a critical factor in determining what the equity value of your company is worth. And it's important to lenders in evaluating your debt capacity so that you can service your debt.'

More importantly to the label industry, Baumgartner explained VAPPH as the sales dollars left to pay wages, supplies, etc. – and hopefully some profit – divided by the number of press hours. Often times management will only examine gross profit margin when making pricing decisions and evaluating job performance. However, Baumgartner stressed the importance of considering VAPPH, Value Added (VA) percentage and Gross Profit percentage together before making these types of critical business decisions. He said, 'While all three metrics are relevant, I believe that VAPPH is most important because it measures the amount of press resources consumed to generate the VA.'

DOUBLE DOWN: GREEN-SUSTAINABILITY

Gary Jones, director of EHS at PIA/GATF, explained the recently launched Sustainable Green Printing Partnership (SGP) to attendees. The SGP is a 'credible registry system identifying "Sustainable Green Printers" for customers and consumers with a third party verification system'.

The first step a printer must take when obtaining SGP accreditation, Jones explained, is to accept and commit to the various guiding principles, including but not limited to: using, where feasible, materials derived from renewable resources with low environmental impact; encouraging change within the supply chain by recommending the use of raw materials that do not threaten or harm future generations; observing the principles of sustainability which have social, environmental and economic aspects; identifying and establishing working means of communication with interested parties to educate and inform them about sustainability.

Secondly, a printing house must follow standardized EHS regulations – air permit, MACT standards, wastewater discharge, stormwater discharge and hazardous and universal waste removal. Printers must be aware that there is not a universal set of regulations. Compliance is location based.

The next step requires the development of a Sustainability Policy (SP) or Sustainability Management System (SMS) that is openly shared with employees and customers. This should be reviewed on a regular basis and must be uploaded on the SGP site in order to complete the application process.

Once the application is filled out and the Sustainability Policy is uploaded, the submission can be reviewed and approved – this means the application is complete and the printing house has moved into Candidate Pending Verification (CPV) status. The facility is listed on the SGP website as a CPV and has twelve months from the time of application completion to obtain verification from a third party.

At this point, the Sustainability Management System and Sustainability Policy need to be implemented. A sustainability committee that meets at least twice a year must be developed and in working form, delivering agendas and meeting minutes

to employees while soliciting input from both them and outside resources. The process is similar to lean manufacturing in terms of data collection and subsequent process improvement, and regular performance objectives must be developed and met (see chart 1). Assessments and evaluations are conducted on a regular basis. Jones stressed that management must be fully on board, and an SMS needs to be added to the list of reviews regularly conducted by an executive team within a printing house. Documents should be retained, and summaries produced and included in the company's annual report.

In conclusion, Jones told his audience that the keys to achieving SGP printer status are: 'documentation, facility wide goal establishment, annual, monthly and daily compliance activities and the involvement of management. Sustainability is becoming business critical as it becomes necessary to retain clients and recruit new ones. Start or expand your program now; it will provide a competitive advantage.'

HIGH ROLLER: PRIVATE EQUITY – M&A

As the industry has seen much consolidation in recent years, and can expect to see even more in the future, Greg Myers from Mason Wells was invited to talk to converters about private equity and the possibilities it can hold for a label and packaging company. Typical private equity buyout transactions include: owners seeking liquidity, a need for additional equity, divestiture of a subsidiary or a public transitioning to a privately held firm.

Myers said, 'When selling you will want to look for a firm with a proven history of closing transactions, a reputation for honesty and integrity, and one with reliable financing sources.'

He explained that when looking at a private equity firm from a management point of view, one where executive teams will need to collaborate for success, the requirements are different. Common business values, a Value Creation approach and industry focus and knowledge are among the important characteristics to look for when evaluating a firm to work with.

One third of packaging transactions are private equity backed and just over 30 percent of label printing transactions. Myers explained that, for private equity to work, the company needs to prepare to tackle challenges head on 'and remain flexible and open-minded, but focused.'

POKER – BEAT THE ODDS: PRO-ACTIVE RISK MANAGEMENT

'Safety is not an expense,' said Pat Olsen, corporate director of risk management for WS Packaging Group. 'It's an investment.' As industry leaders, Olsen said attendees must have a 'safety first' attitude 100 percent of the time because employees watch and learn from their superiors.

Olsen emphasized how the cost of injuries can be harm a company - premium increases alone can pinch the bottom line. But a good loss performance means companies can often be rewarded with lower than state-wide premiums. Management needs to work to prevent losses through aggressive reporting and by developing strong relationships with medical providers, said Olsen. 'Develop measurements and goals, create safety committees and reward your employees frequently,' he said. It also helps to have a single location where associates can go to obtain more information about creating a safer work environment. A risk management score card and safety site survey report could be located there as well as up-to-date copies of a safety newsletter.

Olsen also discussed wellness programs as another valuable means of risk prevention and health promotion. There are various incentive programs that WS has used to increase health awareness amongst its employees, believing that healthier employees are happier ones.



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Film work provides safe harbor for Anchor

ANCHOR PRINTING is targeting its new Aquaflex press investments at film label production, as Danielle Jerschefske reports

From commercial printing to prime labels to flexible packaging, and just about anything you can think of in between, Anchor Printing has found success in offering printing diversity to their customers. It operates 24/7 to keep pace with its customers and this is all done without the help of a sales staff. Anchor Printing appears to be unaffected by a slower economy and customer satisfaction level is extremely high – for good reason. Founded in 1947, Anchor Printing is truly an American success story.

Shortly after World War II, Mark Weitz immigrated to America from war-ravaged Poland to create a new life. Mark traveled to the Detroit, Michigan area seeking work as a printer. His first job was in a small letterpress shop operating out of the basement of a house – they specialized in printing business cards. Within a few years, the enterprising Mark Weitz bought the operation and began expanding its services.

Martin Weitz, Mark's son, recalls the early years and his father's abiding influence. 'My father and always agreed on the importance of quality – it always had to be the best we could produce. My father would simply look at a job, shake his head and say – we can do it better,' he remembers. 'It wasn't about achieving perfection, it was all about getting the most out of what you have and constantly striving to improve your performance.' That mantra of continuous improvement is now being chanted by the family's third generation of Weitz management, Andrew Weitz.

The company continued to grow as a commercial printer until one day, a customer asked if they could print labels for a new idea – 'generic drugs'. Martin jokes, 'We didn't have any problem printing the labels, but it took us weeks to figure out what the heck generic drugs were!' With the addition of a Mark Andy table-top label printer, Anchor Printing was also in the label business.

Today, Anchor Printing has Heidelberg offset presses, a 30" 8-color CI press, an off-line laminator, two Mark Andy flexographic presses and an impressive assortment of specialized converting equipment, including a few custom-engineered proprietary machines. Anchor just ordered two new Aquaflex ELS Servo flexographic presses to handle their growing shrink sleeve and flexible packaging business.

'We place a lot of emphasis on problem solving, which is the foundation of our customer service,' says Martin Weitz. 'Instead of telling a customer what we can do, we ask them what they want and when they want it – then we figure out how to do it and deliver

on time.' A simple yet challenging approach that has helped Anchor Printing earn partnering relationships with most of their customers.

'If one of our customers has a problem applying our labels, we're on call 24/7 to help. We look at it this way – it's in our best interest to make sure our customers' labeling systems operate properly and efficiently. The more labels they apply, the more labels they buy. The happier they are with our total service, the more likely they are to buy other printing products from us,' Martin says.

In addition to printing services, Anchor also offers design and prepress services creating a concept-to-commercial offering to better serve their customers. Andrew Weitz notes, 'Our design and prepress departments really help us expedite our customers' requests. If they have minor changes to fifty SKUs, we can handle it quickly because we have secured storage of and access to all their digital art files. If a customer wants to add a new product to their line, we can apply their design conventions and create new concepts for their consideration. Our staff is very knowledgeable in designing and preparing digital art for virtually every printing medium. That often represents significant time and cost savings for our customers because we can eliminate problems before they get to press.'

Film printing is the fastest growing segment of Anchors' business, representing approximately 60 percent of its total volume. The company was struggling to keep up with demand even with 24/7 operations. 'We bought our first CI press to handle medium- to long-run flexible packaging demands. However, instead of being our flexible packaging work horse, the CI opened a number of new markets for us. We were pleased with the expanded business but we were facing the same production challenge – we still needed inline capacity to



AQUAFLEX ELS Servo
multi-substrate press



MARTIN and Andrew Weitz

handle our growing short to medium-run film-printing business.'

Andrew and Martin recently decided it's time to expand once again. After a careful review and testing of the available film-capable press offerings, they selected the Aquaflex ELS Servo and placed an order for two new presses.

'Basically we're all gear-heads and engineers here – we love machinery,' says Martin Weitz. 'And, we really appreciate well-made equipment like our Heidelbergs. The Aquaflex ELS Servo appealed to us because it is a press designed from the ground up as a new press concept with a well-defined mission. We knew we needed the ability to run thin film and print exceptional process color, and we wanted configuration flexibility for the future. We found the Aquaflex ELS Servo to be the best choice for our needs.'

The Aquaflex ELS Servo platform, however, represents a big departure for Anchor Printing, as Martin explains: 'Going to servo technology requires some new tooling and operator training, but the printing performance and capacity we will gain are certainly worth the investment. We tested a number of presses before looking at the Aquaflex. We liked the solid construction and we were very impressed with the way the ELS Servo held registration though all of our test runs. In fact, we liked it so much that we decided to buy two of them.'

Andrew and Martin view the printing process as a manufacturing process with every page, label, or package representing a zero-defect part. That philosophy has led the company's regimen of continuous improvement in every facet of their operation. It's not just a print run – every part (label) has to reflect their zero-defect aspirations. As Andrew Weitz says, 'We're constantly working to make Anchor Printing a safe harbor for our customers. We want to be their no-risk printer.'

What will the future hold for Anchor Printing? Andrew Weitz sums it up: 'In the past Anchor Printing has operated as the proverbial well-kept secret; now we're changing that dubious status. Fortunately we're very solid financially because we believe in investing in the best – the best people and the best equipment. We continue to build upon our problem-solving corporate culture and our customers' needs will remain our driving priority. It rather comes down to this – exceptional companies seek out exceptional suppliers. Our job is to be that exceptional supplier. I believe if we continue to heed my grandfather's admonition – 'we can do better' – our future customers will seek us out for partnering relationships.'

Bopack adds Datalase to imaging capabilities

Catering to the requirements of the pharmaceutical industry, Bopack has adopted the Datalase imaging process for accurate reproduction of bar codes, data matrices, batch numbers and expiry dates.

The DataLase process – patented in Europe by the DataLase company two years ago – uses a pigment which undergoes a color change reaction from white to black to form a positive image once exposed to a computer-controlled low power CO₂ laser. The process requires no inks, ribbons or other costly consumables, making it simpler, cheaper and more environmentally friendly than traditional printing techniques, according to Bopack. The lifetime of the laser is claimed to be over 30,000 hours and compared to thermal printers it requires little maintenance and no replacing of print heads due to wear and tear. Unlike printing inks or inkjet fluids, the DataLase laser-marked image is not prone to "bleeding" on absorbent substrates.

Bopack has built an elaborate quality control system around Datalase. Firstly, an electronic 'watchdog' circuit checks the accuracy of the process, transmitting signals to immediately remove from the production line, any packages that were erroneously printed.

Then the quality of the labels is thoroughly tested before shipping, as Grete Devooght, label adviser at Bopack, explains: 'In a first test phase, the ink containing the special, laser-sensitive pigment is uniformly applied to the labels. In a second phase, a mini-laser makes a trial impression on the labels. The EFPIA (European Federation of Pharmaceutical Industries and Associations) recommends the implementation of a standardized and unique 2D-coding system for medicines in Europe. This laser technology is the most secure solution to meet this requirement.'

Bopack is one of Europe's leading label converters with six printing plants in the Netherlands, Belgium and France. The company has a total of 76 presses and 600 employees.



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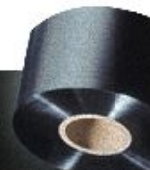
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CELEBRATING the tenth anniversary of the Turkish Label Association, left, Aydin Okay, president TLA and right, guest of honor Turkish navy commander Metin Ataç

Turkish Association celebrates 10 years

FROM SMALL BEGINNINGS during Brussels Labelexpo, 1998, the Turkish Label Association is now one of the most active in FINAT. Andy Thomas reports from its anniversary Congress

The Turkish Label Association's tenth anniversary Congress started with a congratulatory message from FINAT president Jan Frederick Vink, who stressed that 'sustainability' included encouraging the next generation of label industry managers. This is something FINAT has addressed through setting up its Young Managers Club.

In a series of presentations concerning the global economic crisis, delegates heard that small businesses are not the most appropriate structures for a globalizing world, and are under increasing threat from global companies. The answer is to collaborate and to adopt modern structures.

Top banker Hakan Ate, director and president financial affairs at Denizbank, warned of the danger of Stagflation, 'in which no matter how low prices go, nobody is buying'. Ates pointed out that Turkey's main export markets, the EU and CIS, are suffering badly and this had badly affected growth in the Turkish economy: 'we have to hold our breath a little longer'.

LABELS&LABELING

Ates pointed out that as a developing economy, Turkey still requires hard currency, and the government is committed to supporting exporters. But at the same time, it is harder to obtain investment finance as banks become more selective in lending through fear of ending up (personally) liable for bad debts. 'This has created the danger of 'loan sharks' charging 5-6 percent interest a month.'

Concluding, Ates offered the following advice to converters: 'The fast and agile will survive. You must control costs, analyse risks properly and consult with the banks.'

Marc Schillemans, vice president, HP Indigo, Europe, Middle East and Africa, pointed out that economic downturns tend to come every seven years. 'We will be slower to recover from this one because the banks are not taking responsibility – but we will recover.'

Schillemans told delegates that digital printing 'changes the model' for a successful business, and so had great future



(CLOCKWISE FROM TOP LEFT), guests celebrate the tenth anniversary of the Turkish Label Association; Aydin Okay, president of the TLA; winners of the TLA annual awards; Aydin Okay presented with a 'ten years of friendship' plaque from FINAT president Jan Frederik Vink; winners of the student design awards

THE TURKISH LABEL MARKET

Although there are no exact figures for the Turkish self adhesive label market, a good estimate is around 200 million sq meters, *writes Tunc Okay*. The industry has grown by around 300 percent over a ten year period, although demand has decreased during the course of the current economic crisis.

Looking at the market shares of different label types, we estimate pressure sensitive at 58 percent, shrink sleeve labels 10 percent, in-mold two percent and wet glue 30 percent.

How many label converters are there in Turkey? If we limit our estimate to roll-to-roll printing and exclude the very small companies, this figure is around 250 printers. It is very difficult to set sales ranges, but we estimate the lower range at \$1m/year and upper range at \$20 m/year

Flexo is the dominant print process, at around 60 percent, followed by letterpress at 30 percent and screen at 9 percent. Roll offset is just entering the market, as is digital printing. In the last 1.5 years, three HP Indigo presses have been installed.

growth potential. 'The value of digital label printing is already equal to that of sheetfed labels.'

The Congress was completed by presentations from Roger Pellow, md Tarsus Labels Group and this author, looking at global trends and opportunities. Pellow pointed out that despite the global recession, the labels industry continues to perform at 2-3 percentage points above GDP, and there are significant opportunities for growth in developing economies like Turkey's.

In the evening following the congress, the annual TLA Ball was held, including announcement of the winners of the TLA's label print competition and student design competitions.



THE IMPORTANCE OF SOCCER

55 year old Aydin Okay is a former professional footballer at top Turkish club Galatasaray, the only Turkish club ever to win the UEFA cup. He started his playing career in 1971 and continues to play in veterans teams. For six years he was a board member of the Galatasaray Marketing Company

Among the highlights of the FINAT congress in Turkey this June will be a football match between FINAT and TLA members. At the TLA congress Mr Okay revealed the respective team kits.



AYDIN Okay, managing director
Canpas and president of TLA

Turkey joins the label world

THE ENIGMATIC PRESIDENT of the Turkish Label Association, Aydin Okay, is pushing hard for Turkish label converters to benchmark themselves against the best in Europe. Andy Thomas reports from Istanbul

Aydin Okay, managing director and owner of Turkish label converter Canpas, has made it his mission to win recognition for the Turkish labelling industry on the wider European and world stage.

Okay is president and driving force of the Turkish Label Association (TLA), which was founded by a handful of colleagues, at a meeting in a restaurant at Labelexpo Brussels in 1998. A key founder was Rafet Arabacıoğlu, who represented Aydin Okay and Canpas. Today the TLA has 130 members and at the TLA congress in Istanbul in December celebrated its tenth anniversary.

Aydin Okay has always seen FINAT as the main vehicle for raising the profile and the technical level of the Turkish label industry. Canpas has been a member of FINAT since 2003, when just three Turkish label converters were members. Today that figure is 53.

The TLA has organized its own label awards competitions for the last six years, and since 2006 TLA members have been eligible for entry into the World Label Awards.

Okay has strongly encouraged TLA members to enter, and they have been rewarded with significant success in both FINAT and, more recently, the World label awards. Particularly notable were the successes scored by Do a Etiket, in 2007, by Canpas and in 2008 by Detsan Baski San ve Tic.

Aydin Okay joined the FINAT Board in 2007 and it was his energetic lobbying which led to Turkey being chosen as the venue for the 2009 FINAT congress.

EDUCATION

Another key part of Aydin Okay's agenda is to encourage education and training for the next generation of label printers in Turkey. The TLA awards ceremony, held during the Congress, includes awards for the winners of the annual high school label design competition. To encourage environmental awareness, schools are invited to design a label – in 2008 the theme was 'Blue Sea around Turkey' – and more than one million of the winning labels are printed at the Canpas plant for distribution throughout Turkey. The winning high school

students are given a money gift and computer equipment.

The awards for the Blue Sea Around Turkey design competition were given at the TLA congress by Turkish navy commander Metin Ataç to the winning students, their teachers and the school directors.

Okay's company Canpas supports high schools dedicated to print education and universities with dedicated printing courses. 'We have seven students working at Canpas and both sides see the benefits. The kids work everywhere in the company and learn through practice,' explains Aydin Okay.

Next year will see the opening of the first dedicated print marketing course at a Turkish university. 'It is important for students to understand both the technical and marketing aspects of running a successful label business.'

The TLA has become a major force for disseminating best practice among its members, organizing 5-6 meetings a year for both company owners and press operators, discussing topics from obtaining finance to improving print quality. A magazine is published every three months.

In a gesture of extraordinary generosity to boost the technical level of the entire Turkish labels industry, Aydin Okay translated Mike Fairley's industry-leading Encyclopedia of Labels and Labeling Technology - and distributed it free of charge to TLA members.

For the future, Okay has ambitious plans to expand the TLA from its current 51 to 75 by the time of the FINAT Congress in Antalya in June, and to 200 over the next 4-5 years as the Turkish label industry grows. These will all be encouraged to become more active in FINAT, 'so they can be more in touch with their European colleagues. The future of the labels industry will be much stricter rules governing label printing, and this will be to the benefit of Turkish printers'.

Along with the global economic crisis caused by the collapse in the banking sector, Okay believes significant problems remain to be overcome in the Turkish labels sector: 'Overcapacity is a big issue. Lots of people are going after the same business, and the print quality in Turkey is getting better every year. The TLA has no authority over its members in areas

like setting prices. It would be better for suppliers and buyers if we could set prices, terms and conditions. Another issue is the amount of 'B' grade stock and off-cuts flooding the Turkish market.'

CANPAS

Along with his mission to develop and promote the Turkish label industry, Aydin Okay was a pioneer of the pressure-sensitive industry in Turkey and today runs a highly successful label converting business employing 100 people. Canpas was founded in 1974, initially to produce letterpress price labels. In the mid-1980s, Okay took the decision to move into pressure-sensitive (PS) labels and shifted production to flexography.

Canpas' flexographic PS business was built on Aquaflex presses, due entirely to the level of service and support offered by Aquaflex's local agent, Mete Gnder. This strong bond continues today, with a 12-color Gonderflex press currently on order.

Other presses at Canpas include flexo, semi-rotary letterpress, silkscreen, digital, offset and hot stamping machines. The company took its plate making in-house some three years ago.

The main end user markets for Canpas include pharmaceutical, food and beverage, and as well as pressure-sensitive labels, the company converts wet wipes and some cartons. Canpas' customers are primarily Turkish brands, although the limited size of the Turkish market has pushed the company to increase its exports. Today, some 25 percent of Canpas' production is exported to countries including

Germany, Bulgaria, Russia, Turkmenistan and the UK. Canpas holds a lot of stock for its key customers, who call off labels at three, six and twelve month intervals.

THE FUTURE

As the first generation of pressure-sensitive industry pioneers like Aydin Okay approach retirement, succession is becoming a huge issue. Okay is most fortunate in having two sons who are, or are becoming, active in the business. Younger son Tunc is completing a year's work experience at the London offices of *Labels & Labeling* / Labelexpo, while older son Can is involved in the day to day running of his father's business after having completed a university course in Canada.

Asked about future strategy, Aydin Okay is looking hard at the latest trends in label converting: 'We first printed blanks, then later prime labels letterpress. It was flexo for the next step and next it will be offset and digital. Offset is driven by customer demands for higher quality labels in the pharmaceutical sectors. At the same time we are printing smaller quantities of labels. For this purpose digital printing is necessary. The offset press will also allow Canpas to print films and packaging products.'

The second thrust of Canpas' strategy is to make alliances with label converters in other parts of Europe. Aydin Okay is currently talking to three European label converters about printing their labels in Turkey, then sending the finished labels back to their plants. This alliance should be set up by the end of this year. 'We are looking at what kinds of jobs are printed and which we might print,' says Okay.



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THE exhibition was a showcase for Indian manufacturers

India defies global gloom

BATTLING against the terrorist attacks in Mumbai and the global downturn, 5,000 Indian converters turned up for the India Label Show in Delhi looking to invest in new technology. Andy Thomas reports

The first Indian Label Show to be run by Tarsus was successful despite the tragic terrorist assaults in Mumbai which took place just days before the opening of the show and the general downturn in the world economy.

The general feeling among the 200 exhibitors was that visitor numbers were down, at around 5,000, but that the quality of visitors was high.

The Indian labels market has certainly suffered from the global economic crisis, although the sheer size of the internal market has ensured that the industry is still growing in double digits. The fact that India does not rely as heavily as China on export-led growth has shielded it from the worst impacts of the global recession. The World Bank estimates that Indian GDP growth this year will be around 8.5 percent, with labels growth estimated at 11-12 percent. Total label consumption in India is still on an upwards curve. Now close to 2 billion square meters, it is predicted to rise to 3 billion square meters by 2012. To get an idea of the potential market growth, per capita consumption of labels in India is currently around 1.2 square meters, which compares with 6-7 square meters in Eastern Europe and 15-18 in the most developed Western European and North American markets.

It is interesting to see the swing towards flexography in the latest Indian converter survey conducted by the Tarsus group and presented in a keynote speech by industry expert Mike Fairley.

Over 40 percent of converters surveyed reporting the use of flexo, and more than one quarter reporting installation of UV flexo presses. As would be expected, there is a significant usage of sheetfed offset – with over one third of respondents reporting that they produce wet glue labels. But the trend towards PS and away from wet glue is already clear, if gradual. Although wet glue dominates by volume, PS has already overtaken wet glue by value and PS volume is growing at

2-3 times that for wet glue. For labels it is still screen printing which predominates, with over half of converters using this process, which will mostly be flatbed. Letterpress remains firmly entrenched.

India is a market marked by the vibrant growth of smaller, highly entrepreneurial label converters – much as we saw in the early days of development in Western Europe and North America. These companies are typically set up by new opportunistic entrants to the industry, or by skilled press managers. It is estimated that there are around 500 dedicated PS label converters in India today, with the number producing PS labels having increased by one third since the last L&L survey in 2007. At the same time, we are seeing the entry into India of major global converters like CCL and Brady Corporation, who now sense a big opportunity for growth in the country. European players have started bringing their business to India, either setting up their own operations – as in the case of Reynders – or as joint ventures, as is the case with Nordvals.

In terms of profitability, Indian converters compare very well with the rest of the world, with one half of respondents to the Tarsus survey reporting sales growth of over 15 percent, and less than 10 percent reporting growth of less than 5 percent. Profitability levels are up across the board compared to the last survey in 2007, all of which compares very favorably with profitability levels in Europe, North America and Japan.

The Indian converter market is characterized by a consistent and growing investment in new 'entry level' machinery from the major European suppliers. Typical choices are the Gallus EM280, Mark Andy 2200s, 4150s and LP3000s – the company says 17 presses were sold in 2007 alone by its distributor FIG – and Nilpeter FB3300s, with the Danish company now reporting seven installations. Other presses which have sold well include Gidue Combats and Focus presses, while MPS has now sold three machines, the latest to Etiprint. On the letterpress side,



5,000 converters attended last year's India Label Show, and stands with working machinery were regularly full

Orthotec, Lintec and Labelmen are popular choices.

Indian manufacturers of flexo and intermittent letterpress machines have also enjoyed increasing success. Mike Fairley noted that last year there were 200 narrow web press installations in India of all kinds once we include local as well as international suppliers.

Digital has yet to make a big impact in India, although HP Indigo has now sold its first label press in the country.

On the materials side, we have seen major investments in coating capacity made by Avery Dennison in its Pune coating plant last year, while UPM Raflatac has invested in a slitting terminal in Mumbai. Although the vast majority of labels in India use paper face materials, both Avery and UPM Raflatac seem convinced that there will be a growing market for advanced filmic products.

Raflatac, for example, introduced its 56-micron Raflex Plus polyolefin film combining the conformability/squeezability characteristics of PE with the oriented print and die cut performance of PP, targeted at the home and personal care markets.

In his keynote speech, Raj Srinivasan, managing director Avery Dennison Roll Products India said more advanced PS labeling solutions would be driven by the overwhelming youth of India's population, 65 percent of whom are under 25. Their impact is likely to be seen in areas like premium beers, which have already moved to PS globally. Srinivasan said that the usage of advanced PS solutions in India would grow as brand owners concentrated more on the total cost of ownership: 'In tough times, new solutions can open up new opportunities for brands.'

This feeling was reflected among exhibitors on the show floor. Kocher & Beck's Martin Stierle has been exhibiting

in India since the first Label Show and says he now detects a definite change in expectations of quality as Indian converters look to compete in globally. But K&B agent Vijay Pareek, of Genius Flexo Machinery, who is also agent for MPS, says even converters who buy top of the range Western presses are buying low specification rotary tooling. 'They buy a high end press, but when it comes to ancillaries like the anilox, anvils and magnetic cylinders, they do not understand that there is a difference between suppliers. They learn the hard way when they find you can't run the machines at the rated speeds. Our job is to show them that top class tooling can add value.'

Vijay gives as an example of good practice Pragati Labels, which installed the first K&B Gapmaster die pressure setting system in India which allowed them to print much faster. 'If printers do not have the equipment to measure in microns, they are likely to blame the materials supplier or the press manufacturer if they are not cutting properly. In the worst case they will have to stop running the job.'

MACHINERY

There is clearly a great hunger for knowledge about new press technology from Indian converters. Those press manufacturers who brought presses to the show – including Gallus, Nilpeter, Rotatek, Focus Machinery, Orthotec, HP Indigo and Gidue – were rewarded with full stands whenever a demonstration was under way.

Nilpeter A/S and Proteck Machinery introduced their newly formed joint venture, Nilpeter India Pvt, which will be located in Chennai. The sales department is headed up by Manish Kapoor and the applications department by C. Kanivannan. The managing

SMARTECH

Martin Automatic announced a major order at the show of three MBS butt splicers to Mumbai-based Smartech, which is installing them on three of its nine Ko-pack presses.

These latter generally are used for longer runs of 50,000+ pieces on non-PS applications. Turret rewinds are under consideration. Smartech's Bimal Mehta said 1,000m reels can now be put on the press, with just two rolls per job. 'This saves us 25 roll changes a month, with 25-28 meters per roll in waste. Importantly, it also maintains tension throughout the press which allows better print consistency, while the operator is relaxed and can concentrate on quality. ROI will be around 1.5 years.'

Interestingly, the company's next move is unlikely to be flexo, but to digital. 'Although run lengths remain high overall, the trend towards a greater number of variants makes flexo less competitive than digital,' says Mehta. 'There is also likely to be a greater trend towards personalization. Changeover times and plate costs are the big issues with flexo.'

The company specializes in the FMCG, lubricants and booklet label markets.

director of Nilpeter India is Alan Barretto, a long-time employee of Proteck Machinery who has extensive experience manufacturing products for the graphics industry.

'We will use the same high quality Nilpeter parts as normally expected by the label printer,' explained Barretto. 'The obvious advantage for the Indian printers is shorter delivery times of the press itself. However, quick delivery of parts and service, all only hours away, no matter where in India the press is installed, makes us stand out from competition.'

The first Indian built press is expected to roll off the production line early this year. The press at the show was an FB3300 Servo already sold to Synergy Print in Mumbai.

Gallus has had great success with its EM280 press in India, and was introducing to the Indian market the latest servo-equipped version. The addition of servos to the new web transport system now allows automated compensation for substrate thickness.

Rotatek took the bold decision to demonstrate its top-of-the-line Brava offset press which can be switched between semi-rotary and fully rotary modes and can incorporate flexo, screen and foiling in-line. Rotatek has been in India for the last 15 years via local agent Creed Engineers and has five dedicated label presses installed, each fully loaded



for combination printing for multi-national clients.

'Perhaps the top 50 Indian converters can now afford this kind of press model when the percent import duties have been added,' said Rotatek's Gaetan de Charry. 'We use the argument that the total cost profile is better than flexo: 8-and even 12-color jobs flexo can be done 4-color offset, and the consumables cost is lower.'

Gidue, with local agent Reifenhauer, was demonstrating an 8-color S-Combat 370mm flexo press bought by Webtech in Mumbai – the third sale by Gidue in 2008.

Orthotec was showing its recently launched screen press, claimed to operate three times faster than its closest competition at 6,000 m/min, as well as its intermittent offset press incorporating a new registration system. The company plans to launch a new, modular machine in Europe.

Amrit Sheth, CEO of Label Planet, which acts as agent for both Focus and Orthotec, said he was seeing the results of the recession – 'we need to restore label market growth – although some markets such as pharma are holding up. Pharma always grows in a recession and around 80 percent of production in India goes to export.'

HP was demonstrating its ws4500 digital label press with its Smart Stream workflow, created in collaboration with EskoArtwork for optimized pre-press, color management and variable data-barcode production. Andrew Ng, HP's industrial category manager Asia-Pacific & Japan, reported several potential sales leads, and HP sees great potential for digital printing in a country with 28 states using multiple languages and each with its own sets of legislation.

Stork Prints demonstrated its latest EasyFit lightweight 'cassette' format rotary screen printing modules designed for modular hybrid presses, where different processes can be interchanged with each other at any stage in the printing sequence. Typically under 27 kg, they are light enough to be set up manually, and are ideal for situations where fast-changeovers are essential. Makeready times are as low as ten minutes. Adjustable support bearings allow fast repeat-size changeover within a restricted environment, without the need for recalibration.

Weldon Celloplast has, in the past year, transformed itself from a manufacturer of pressure-sensitive materials into an agency for a wide range of global narrow web machinery and consumables suppliers. These now include PGM Graphics Solutions – specializing in refurbishing and upgrading pre-owned Gallus letterpress and flexo machines – Bunting Magnetics (magnetic cylinders), Flexo Concepts (anilox cleaning systems and doctor blades), Label Traxx (MIS systems), Lartec (flexible dies), Lederle Machine Company (rotary tooling and ancillary products), Matho (waste management solutions), PMR (label application systems), and Systec (plate mounters). Weldon has also announced the agency for materials specialist Manter.

The new business is being run by Pawandeep Sahni, the son of owner Harveer, Weldon's principals reported a good show,

LABELS&LABELING



THE FIRST MEETING OF FINAT'S YOUNG MANAGERS' CLUB, (l-r) Gautam Kothari, Interlabels; Christian Gali, Manter; Pawandeep Singh Sahni, Weldon Celloplast; Ajay Aggarwal, Syndicate Labels; Bibiana Rodriguez, Rotatek (chair); Sandeep Zaveri, Total Print Solutions; G. S. Jandu, Jandu Engineering Works; Gautam Kothari, Thomas, L&L

FINAT YOUNG MANAGERS

FINAT held the first meeting of its Young Managers Club (YMC) around the India Label Show. The YMC was formed to bring forward the next generation of label industry managers. Chaired by Bibiana Rodriguez of Rotatek, attendees included Ajay Aggarwal, Syndicate Labels; Christian Gali, Manter; G. S. Jandu, Jandu Engineering Works; Gautam Kothari, Interlabels; Pawandeep Singh Sahni, Weldon Celloplast and Sandeep Zaveri, Total Print Solutions.

Indian members voted to join the YMC rather than the LMAI setting up its own group, and agreed to hold their own annual event. A secure platform on the FINAT website will be set up where all YMC members can interact and network on-line.

Following the YMC meeting, Roger Pellow, MD of the Tarsus Labels group, ran a workshop on opportunities in the Indian labels industry as part of the European-Indian labeling exchange program. It was unfortunate that due to the terrorist attacks in Mumbai, there were many cancellations from the European side. The evening cocktail networking event and dinner were sponsored by Manter.

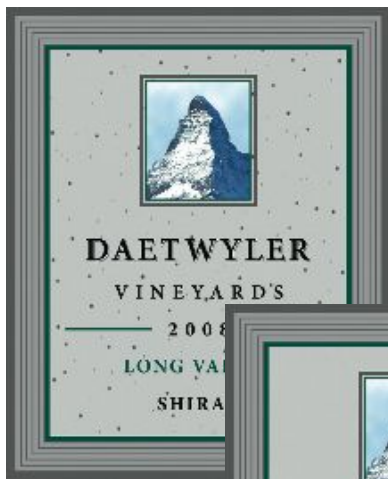
with LabelTraxx, for example, selling a full MIS suite to Janus International. On the materials side, Weldon was majoring on its new range of security labestocks, which can be configured with multiple levels of security, overprinted and foiled and applied on standard machinery. Typical applications include shipping cartons, duty free shopping bags and courier bags.

DuPont Packaging Graphics demonstrated for the first time in India the Cyrel FAST thermal processing system along with the Cyrel DFQ high durometer Cyrel FAST thermal plate. Vijay Ramashandran, marketing manager DuPont Packaging Graphics Asia Pacific, also introduced the Cyrel FAST sleeve system, targeted in our industry at the 500-600mm mid-web format. At drupa, DuPont showed a bridge between a CDI sleeve imager and the FAST processor which holds out the possibility of a fully automated plate shop with no manual handling.

DuPont is making a strong case for the environmental footprint of these products, particularly with Wal-Mart's packaging scorecard. Ramashandran said the global label community had been a pioneering user of FAST processing.

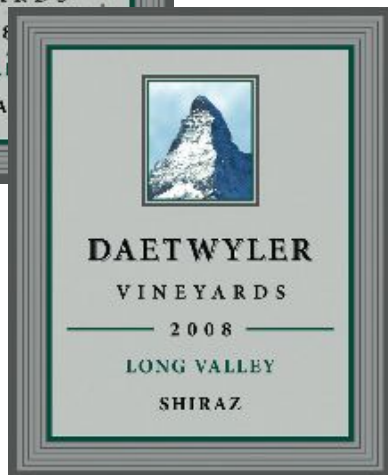
MIS specialist Shuttleworth secured an order from the show, adding to its growing installed base in India at leading companies like Webtech, Interlabels and Superlabels.

Bielomatik introduced its entry level Smart One T-250 smart label converting system, which can produce up to 60,000 inlay insertions an hour – and test the chips. Bielomatik also showed examples of its FT-LoopTag, which contactless coupling to secondary UHF antenna – widening the placement tolerance and thus making it easier to apply.



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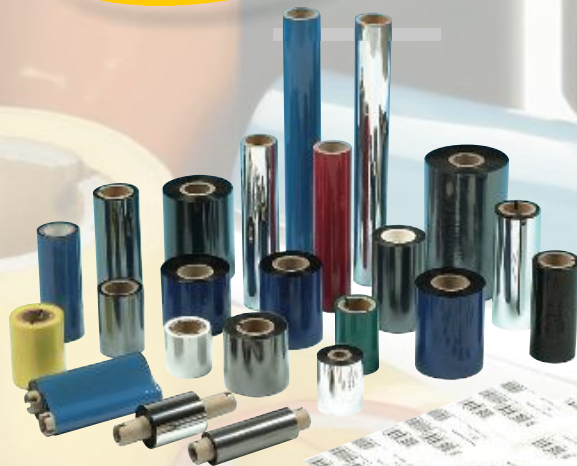
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(L-R) Roger Pellow, Harveer Sahni, Manish Desai, Vivek Kapoor, RL Deshpande, Sandeep Zaveri, Amit Sheth, Raj Srinivasan

And the winner is...

THIS YEAR'S INDIAN LABEL INDUSTRY AWARDS, held alongside the Indian Label Show, highlighted the world-class printing skills of the country's label converters. Andy Thomas reports

India's top label converters were honored at the annual Indian Label Industry awards in an event marked by high emotions, feasting, music and dancing. The host and compere for the evening was Mandira Beddy, a famed Indian actress and equally famous for hosting the cricket World Cup in this cricket-mad country.

Avery Dennison was Gold Patron of the Label Manufacturers Association of India (LMAI) Indian Label Industry Awards, jointly organized with Tarsus. Avery Dennison and the LMAI pioneered the awards in 2004 and Raj Srinivasan, MD roll materials India at Avery Dennison, made a keynote speech at this year's event. Other supporters of the evening included Gallus, Nilpeter, Omet, Stork Prints Stovec, Creed, Label Planet, Gerhardt, Gidue and Rotatek. The awards were a particular triumph for Ajanta Packaging, which swept the board in the offset categories, with wins in the offset line, line&screen and

process categories, and multi-process line. In the end use categories, Ajanta scored in the offset wine/spirits divisions. The company also secured an award for its screen line/tone work.

Multiple awards also went to Anygraphics in the letterpress line and process, screen process and non-pressure sensitive and tags categories. Webtech India dominated the flexo categories, with wins in the flexo line, line&screen and color process categories, while Interlabels won in the letterpress wine/spirits and multi-process color sections. Wintek won awards for its flexo cosmetics work and in the multi-process line&screen categories.

Other winners included Creative Labels for its letterpress line/screen/tone work, Pragati in the flexo wine/spirits category, Mudrika in the letterpress cosmetics category, Syndicate Labels in the coupons/tickets category and Precise Labels for its Booklet labels work.

A special award for innovation in in-line printing and converting went to Seljagat Printers for what the judges remarked was 'excellent picture and color reproduction in flexo.'



THE ORGANISERS: (R-L) Tasha Janowski, Kavneet Sahni, Mandira Bedi, Raymen Grewal, Claire Farrugia, Jade Grace



OVER 500 printers and suppliers enjoyed the awards night



INDIA label awards judges (from left) Deepak Manchanda and Rajiv Dhar



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Thinner liners present die cut challenges

AS label laminates are reduced in thickness for reasons of cost effectiveness, label converters need high tolerance die cutting systems to cope with a new generation of thinner filmic release liners. Herbert Knott looks at the issues

THE LINER MATERIAL

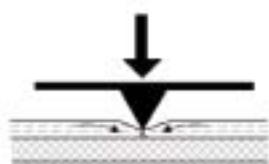
Considerations of cost reduction have seen Glassine liner material reduced in thickness from dimensions of 0,065 mm to 0,045 mm. Yet in the label processing chain, ever higher speeds are being reached, placing additional stress on the liner, and the need for an intact liner has become critically important. Where weight has been reduced to achieve lower dimensions, the result is a higher compressibility of the liner, which raises substantial problems when cutting plastic face materials. Furthermore, glassine liners show height differences of 10 microns and more, so cutting problems seem inevitable.

Therefore, increasingly, and especially for filmic label materials, film liners are being used, mostly PET with tolerances of just a few microns. But improved stability during the converting process is bought at a price.

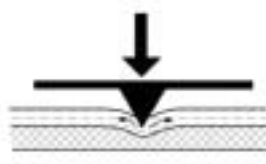
The drive towards cost efficiency here has also meant reduction of substrate thickness, which both reduces cost and means more labels on the roll. We have seen PET liner thickness reduced from 50-55 micron to only 30-31 micron, with another trend going down to 23 micron. Cost saving yes! But it also has an effect on the basics of die cutting technology.

DIE CUTTING

Die cutting in label printing is not cutting in a traditional sense. This 'pressure cut' means separating the material by compressing until it bursts, or is divided. Hard materials such as polyester, polypropylene or paper burst. A compression rate up to 65-70 percent of the material volume through the pressure of the die cutting line leads to a relatively sudden fracture of the substrate.



Hard label materials burst through pressure and tension in the label materials



Soft label materials have to be penetrated entirely, the material envelopes the cutting line

But with soft and soft-tough materials such as PE, PVC and similar, the cutting process is significantly different. Under pressure from the cutting line, the material parts to the side: a clear compaction process like with paper does not take place.

The result is that the die line needs to penetrate the liner material much further to achieve the separation of the upper material. The die manufacturer, therefore, needs to raise the cutting line a little bit and adapt the cutting angle and the mirror width of the cutting line.

Where is the problem, one could argue? Even on very thin PET liners of 30 micron and 23 microns, with the flexible die

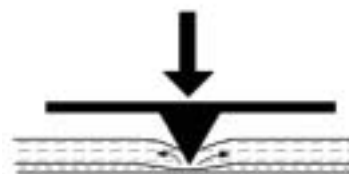
manufactured slightly higher, or a correct adjustment of a variable anvil cylinder, the cutting result should be as good as with a 'normal' PET-liner. Unfortunately, not always.

Every part of the die cutting systems has its own tolerances. Involved in the die cutting process are upper and lower material, magnetic cylinders, flexible die, anvil cylinder, possibly the substructure of the anvil cylinder and the draw rolls. Additionally the bearings of the magnetic cylinders, the anvil cylinder and their substructure as well as the general stability and stiffness of the cutting unit, need to be factored in.

In practice, not just brand new components are in use. Concentricity fluctuations on magnetic cylinders of 10 microns are not rare, while out of roundness or worn anvil cylinders alter the magnetic cylinder gap of 0,480 mm significantly.

If the flexible die then shows height differences between 5 to 10 microns, there is a problem.

The lower dimensions of a 23 micron PET-liner do not 'forgive' such deviations like a 50µm liner does (see below).



A SYSTEM IN TOLERANCE

The basic requirements for label production on thin PET liners are magnetic cylinder and anvil cylinders with 3 micron runout accuracy. An anvil cylinder without support rollers also minimizes a build-up of errors. Adjustable units must be in absolute mint condition to keep the tolerances. When dimensioning, in all cases the 1:1 rule should be respected: the circumference of the magnetic cylinder as well as the anvil cylinder must reach at least the maximum working width. The die lines must be sharpened with a flank angle of 40°-75° and tailor-made to the softness, lamination or layup material characteristics. They need to be manufactured with the best possible cutting ability at the top of the blade. In addition, a die height tolerance of ± 2 microns is a must.

There will be success for the label printer in the use of thin PET liners when all die cutting preconditions are optimized.

ABOUT THE AUTHOR

Herbert Knott works for Electro Optic, which has developed a patented back-grinding process for its high precision Gold Line and Dura Line flexible dies. Graphics and translation courtesy of Gerhard Isopp.



THE Drent Kameleon a variable rotary continuous stationary press from the 1960s



A Drent Gazelle press from the 1980s

Drent celebrates 70th anniversary

FOUNDED in 1938, Drent has played a crucial role in the advancement of web offset presses for a variety of markets

In 1938, Hendrik H. Drent started a business in the cradle of the Dutch paper industry, Eerbeek. Initially specializing in converting equipment, he soon started producing folding and printing machines, and the company evolved into a producer of web offset presses.

The business flourished in the years following its foundation, and in 1948 Drent took its first steps into the international market by selling parts to an English firm. In the 1960s, the company, by now employing 22 people, began to focus fully on the graphic arts industry. In 1966, with Hendrik Drent retiring, the company was taken over by WIFAG of Bern, Switzerland.

This takeover proved the catalyst for the company becoming a specialist in the development, production and sale of web offset presses worldwide. In 1996, the company was bought from WIFAG by Etienne d'Hauwe, who remains owner to this day. The company is led by CEO Rob J. Teunissen.

INDUSTRY FIRSTS

Many years of engineering progress resulted in the introduction of the Drent Vision, the world's first shaftless web offset press, in 1996. At present, around 200 of the machines are installed worldwide. The Vision is particularly suited to printers in the direct mail, commercial printing, business forms, security printing and wrap-around label markets.

The company began to develop its knowledge of servo technology into a gearless concept. With the introduction of the VSOP (Variable Sleeve Offset Printing) press at Ipex 2002, Drent Goebel was the first to offer a web-offset machine that can print in all variable repeat lengths.

The VSOP press technology pushed offset into the realm of packaging and label print markets. Drent Goebel now boasts around 100 installations of this machine for applications such as flexible packaging, commercial printing, all kinds of labels, folding carton and even heavy paperboard.

DRENT GOEBEL GROUP

As well as growth achieved from developing new technology, the company has expanded through acquisitions. Goebel, a producer of web presses for stamp and banknote printing, merged into the Drent Goebel Group in 2001.

Established in Langenfeld, Germany, in 1927, Giebelier was acquired by Drent Goebel in 2003. Giebelier's presses are found throughout the world in direct mailing, package printing, corporate printing and security printing. The most recent acquisition was that of RDP Marathon based in Montreal, Canada, in August 2005.

Trend Graphic Services, located within the Drent Goebel headquarters in Eerbeek, was established in 1996 dedicated to the reconditioning of printing presses. Trend purchases used machines, refurbishes them to new condition and customizes them to the customer's needs.

'The people behind Drent Goebel continuously focus on offering innovative solutions in the market of web offset printing,' said a spokesman for the company. 'By combining continuous innovation with high quality standards and important values such as durability and sustainability, they are able to provide printers around the world with the best printing technology.'



LABELS&LABELING



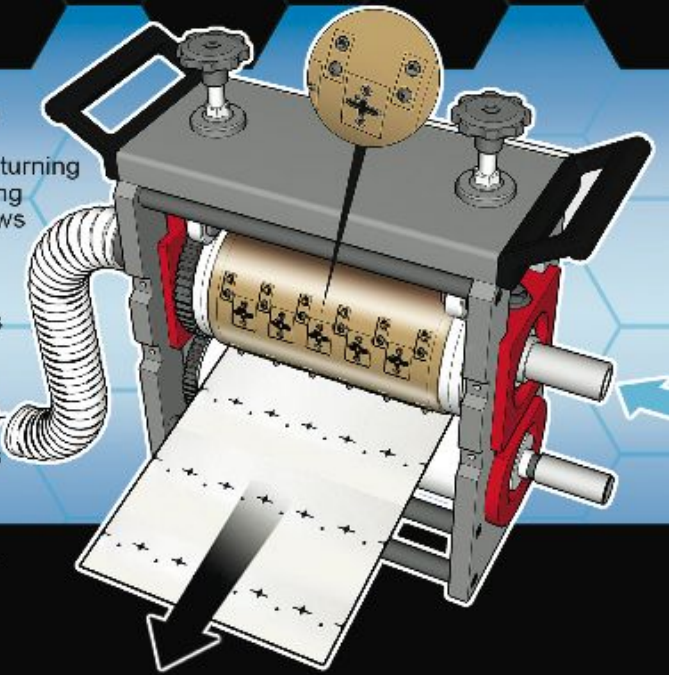
L-R Etienne d'Hauwe, owner of Drent Goebel. The VSOP press brought offset technology to the packaging and label markets and Drent's office in the 1970s. The Drent Goebel head office is still at the same location in Eerbeek, the Netherlands



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Polish first for servo **XP5000**

MARK ANDY has made a breakthrough in Poland with the installation of the country's first servo-driven XP5000 press. Andy Thomas reports

One of Poland's leading label converters, Wiking Graf, has installed the country's first top-of-the-range, servo-driven Mark Andy XP5000 press. The new press joins a bank of older flexo machines that were not capable of moving the company into the new high quality and complex label areas being demanded by Wiking's customers.

These markets, largely pharmaceutical, but also oil industry (lubricants), have a growing need for additional information to be printed on all packaging. With the current EU directive for pharma instructions to be printed in no smaller than 7-point type, Wiking's current practice of printing them offset and folding down to size, needed more lateral thinking.

With this in mind, the new XP5000 press is specified with a Longford inline booklet unit to allow this work to be carried out in one pass, saving time and floorspace, as well as reducing costly work in progress. Part of a USD \$2m investment package that included a Mark Andy VSR rewinder with die cutting capability, and an AVT camera for 100%

LABELS&LABELING

inspection, the new 330mm flexo press is seen as complementary to Wiking's installed technology.

Before deciding on the XP5000 press, Wiking owner Marek Jakubowski made a detailed study of alternative presses both at Labelexpo Brussels and at the manufacturers' demonstration facilities:

"With a significant number of Mark Andy presses being sold to Polish converters in recent months, Mark Andy and local distributor Digiprint have announced plans to boost back-up service in the region"

'A proven track record for after sales support and residual value of the press were as important initially as servo drive technology, which is a bonus for the added control it offers and therefore the greater scope for handling difficult jobs.'

The press is specified with eight flexo heads, a screen printing unit, hot and cold foil capability, inter-station

die cutting, laminating, web turn bars, delam/relam, dual die stations and dual rewind. Crucial to its ability to produce high quality at speed on difficult substrates, chill drums are fitted for UV curing films, and other heat sensitive substrates.

Wiking has also invested in its studio and EskoArtwork CtP pre-press capability, a new training program for its 100 staff, and for the first time, the facility to produce dies in-house.

Set to build quickly on the successful business created by his father in 1986, Marek Jakubowski and his wife Anna are focusing their time and money on establishing a production unit that offers 'flexibility, fast turnaround,

(L-R) Tom Cavalco, Mark Andy, and Janusz Kolodziej, Digiprint, with Anna and Marek Jakubowski, Wiking, with the new Mark Andy press





WIKING also invested in a Mark Andy VSR inspection rewinder with die cutting

competitive prices, and the ability to work with customers in the development of new product types. The well planned 3,500 sqm factory is ideally suited to achieve these goals.

With a significant number of Mark Andy presses being sold to Polish converters in recent months, Mark Andy, and local distributor, Digiprint have announced plans to boost back-up service in the region.

POLISH LABEL ASSOCIATION GAINS STRENGTH

A strong association is the mark of a thriving label industry, and the Polish Label Association (PLA) is looking to boost its presence with a new membership drive in 2009.

The PLA was established in 1997 by Romuald Szperlinski of Introl, who acted as chairman for its first ten years before handing over to Artur Nowaczyk, vice president of the Poznan-based Natalii Spolka company.

The association acts as a forum for the country's label converters who meet every three months to discuss all aspects of their business and the market from customers to suppliers, and production problems to personnel issues. Membership is open to all label converters – currently 20 companies have joined – but the association is actively seeking to recruit new members. More details will be available on the website that is under construction; log on to: www.sppes.pl

Looking at the Polish label market by volume, Artur Nowaczyk estimates self adhesive labels represent around 55 percent, wet glue 10 percent, with IML, cut & stack, OPP, and shrink sleeves making up the balance.

There are altogether around 160 narrow web converters in the country, employing some 8,000 people. Work is produced mostly on exo presses, which number 200, with about 20 letterpress lines making up the total capacity.

The main markets for this output are the chemical, cosmetic, food, and pharmaceutical industries of central and western Poland, food – especially fish – and pharma in northern Poland, and the automotive and paper/stationery industries in the south of the country.

Artur Nowaczyk puts year on year growth at 4-5 percent by volume, but more interesting is the move to higher quality labels and new products, which was highlighted at the Taropack trade fair in Poznan, held the week after Labelexpo Americas. 'I believe Poland will see an ongoing move into the new areas mentioned above, namely IML, cut & stack, OPP, and shrink sleeves,' concludes Nowaczyk.

HP Indigo enhances Capture business program

The new enhanced Capture business program is designed to help HP Indigo customers maximize productivity, create new business opportunities and get the most out of their digital presses. The new Capture site on the redesigned portal is now split into three areas – tools; training; program and communities. Visit www.hp.com/go/myhpindigoweb to login to the new program.

Here HP Indigo customers will find an overview of Capture and what the business development program offers, and its three new areas – tools, training, programs and communities.

The tools section has been broken down into three different areas to help customers identify the tools best suited to their job and business environment. There are tools for labels and packaging; tools for production; tools for selling and marketing digital print.

Understand how HP and digital print can demonstrate environmental commitment to your customers, download the label job or commercial estimator or take advantage of our new supplies and media tools, finishing and workflow partners and best practice guides.

Select the training tab and sign up for HP's complimentary educational courses, where you can find more information on classroom based courses or select to register for online training designed to help successfully market and sell digital print. Next, visit the programs and communities section. Here you can find information on online user groups and forums, as well as HP industry partnerships such as the Print On Demand Initiative (PODi).

Use the Capture business success program to locate a range of tools designed for use in the label and packaging markets, including:

- The Label Job Estimator
- The Label Market White Paper
- Brochures on HP's tower of production, HP's digital solutions for wine label printing and pharmaceutical labels
- 'Marketing in the Digital World' and 'How to make an impact in new market segments', tools designed to encourage you to expand your label printing business with profitable digital applications and information on how to take advantage of gaps in the marketplace and new and emerging markets
- Success stories from the European digital label printing market
- How-to-Guides on topics ranging from lenticular applications to substrate optimization



HP Indigo's WS6000 press

When performance

FACED BY SOME MAJOR CHALLENGES, film manufacturers have introduced several innovative products. Barry Hunt examines the key developments

The fluctuating costs of raw materials – as typified by recent huge rises and equally steep declines in oil prices – represent huge challenges for film manufacturers, along with the other polymer and chemically-based industries. As the global economic crisis takes hold, the demand for all film-based packaging products is also beginning to weaken, although there is more equilibrium with raw material costs. Overall, these developments make the contributions of film manufacturers to reduce total costs and packaging waste through new methods and applications even more relevant.

One of the more obvious developments is the move towards thinner films. These downgauged products benefit both converter and end-user alike. Thinner films help reduce package weight for both labels and containers. They also produce reels capable of delivering up to 50 or 40 percent more material, hence more labels per reel. This means fewer reel changes on presses, as well as on application machinery. There are also benefits related to transportation and warehousing costs. The downside is that printing and handling thin webs of a heat-sensitive substrate requires even greater care, even on presses equipped with electronic servo drives. Applying extra-thin filmic PSA labels on many applicators can also be difficult, especially if the substrate lacks sufficient stiffness, or rigidity. This is more of a problem with conventional wipe-on dispenser heads than it is with the non-contact, air blow/tamp heads.

Michael Taylor, business development manager at Innovia Films, agrees that thinner films will affect dispensing ability and ultimately the end-users' installed label applicator base: 'Developments in substrates, adhesives and liners all lend themselves to possible downgauging, which can be demonstrated in specialized applications. However, it will take a considerable time for wholesale market shifts towards thinner films. It must be recognized that any savings achieved by end-users must be balanced by the cost of investing in new dispensing equipment.'

Downgauging is one among several initiatives taking place in the film world. Some can be a little unusual. Take for example the joint venture between EskoArtwork, a pre-press software developer, and ExxonMobil Chemical, which makes oriented polypropylene (OPP) films. About 18 months ago they came up with PacVantage, a software tool for jobs printed on HP Indigo digital presses using Digilyte OPP. The tool is said to guarantee color accuracy by allowing HP press operators to quickly and accurately match any color adjustments made to the digital proof with little or no on-press adjustments. The project was broadened to include filmic labelstocks when at the last Labelexpo Avery Dennison agreed to make available clear or white-coated Digilyte facestocks.

Again in a PSA context, the concept of engineered

performance films has come to embrace hybrid constructions. The commonest are blends of the two main polyolefins: polyethylene and polypropylene. The idea is that a single substrate combines the benefits of two, for example combining PE's conformability with PP's superior 'no-label look' clarity. They date back to the early 1990s when Avery Dennison – essentially a paper-based laminator – moved into engineered films. Using a new type of co-extrusion manufacturing process, it introduced Fasson Primax and Fasson FasClear, both of which have been upgraded. Another example of an engineered film is Rayoface CZPA from Innovia Films. It is said to offer the high clarity and excellent conversion properties of a BOPP film with the squeezability of a PE film.

Hybrid constructions have benefited from a new generation of polymer and process technologies. They may not be the complete answer to all labeling problems, but they have a particular relevance in some key applications, especially the cosmetics/toiletries, and health/personal care sectors. Also, today's multi-layer hybrids constructions have a synergy with modern trends towards globalized brands and standardized packaging where end-users seek to rationalize their substrate choices.

Another area of film activity is coating technology. While many converters use on-press corona treaters to maintain suitable surface dyne levels, there is still a big demand for labelstock films supplied with water-based acrylic top coatings. These are formulated to ensure good ink or lacquer receptivity on what are essentially waxy, low energy surfaces. However, even this seemingly simple process has become a lot more complicated of late. Narrow web converters now tend to use a combination of conventional or digitized print decoration technologies, which collectively increase the demands on a film's surface.

Compounding this complexity is the need for manufacturers to tailor their products for different end-use applications. Essentially, it means engineering a film's capabilities into various permutations of single or multiple layers, with or without a corresponding coating. This is especially important for unsupported films used in packaging dry or wet food products, and some beverages. For example, a film may have up to five thin layers, each of which determine such characteristics as ink adhesion, anti-static and anti-misting control, adhesive receptivity, slip control, and anti-odor or chemical migration. Usually the thicker core layers provide a film's rigidity and can be either transparent or pigmented to achieve opaque effects. Thicknesses may range from around 38 to 75 microns, depending upon label type.

Shrinkable films, especially shrink sleeves, have changed much of the labeling landscape, allowing many eye-catching types of packaging. Heat shrinkable PVC and PET films have a significant position here, although several manufacturers have

matters

developed shrinkable grades of OPP. An early development was ExxonMobil Chemical's Roll-On, Shrink-On (ROSO) method, offered as a high volume alternative to shrink sleeves for decorating contoured soft drinks bottles, aerosols or cans. Here, the film labels are wrapped around the container and sealed with a hot-melt adhesive instead of being formed into a tube prior to application. The container then passes through a shrink tunnel, with heat applied only to the areas requiring shrinkage.

As alternatives to wet-glue applied labels, OPP patch film labels offer brand owners distinctive clear-on-clear effects. This level of differentiation works well with certain premium-branded beers and some spirits. Their overall growth is governed by facilities at bottling plants, although more lines are fitted with magazine-fed film/paper label applicators. The key here is that both types use similar aqueous adhesives. Patch films offer film manufacturers another useful outlet for their products. Some challenges remain, such as overcoming the problem of lines of adhesive showing through the transparent film. Ensuring the wet adhesive can dry on a film surface that is in effect a moisture barrier is another challenge.

OPP's versatility is also seen in in-mold labeling. By definition, IML requires a substrate formulated to be melt-compatible with the polymer used to make the container, now usually injection rather than blow molded. This esoteric sector has seen notable growth in South East Asia and North Africa, while until recently doing well in the USA. By contrast, European growth has hovered around the 5 per cent level of total label volumes for some time. Andre Soterio, technical manager of Yupo Europe (which makes synthetic papers, not films), writing in the L&L Yearbook, argues this is down to the fragmentation of brands on supermarket shelves. The same amount of labels may be produced, but they are spread across more label designs resulting in runs that are too low to justify IML. For this

reason, Yupo and the specialist OPP manufacturers, such as AET, ExxonMobil, Innovia Films and Treophan, are hoping to maintain momentum in the key emerging markets, especially China and India, where run lengths remain fairly high.

SPECIALIZED APPLICATIONS

One area closely identified with engineered, high performance films is that of security and brand authentication. Here the material of choice is invariably polyester (PET) or the proprietary derivatives. PET's durability and good dimensional stability under the most exacting conditions make it ideal for a large range of specialized labeling products, including tamper-evident seals and labels, electronic data labels and various temperature or time-sensitive smart labels. Suitable top coatings allow different imaging methods, such as thermal transfer or laser printing. They are supplied in clear, white and metallized top coated grades, invariably teamed with a permanent acrylic-based adhesive. Clear grades are a good alternative to direct printing on ampoules, syringes and cosmetic containers. Clarity and heat resistance allow the use of UV light to detect missing labels in pharmaceutical applications.

PET is also used extensively for tamper-evident PSA labels that leave 'void' text patterns when illicitly removed from a product. The introduction of Fasson PET Silver Matt extended this well-established concept to HP Indigo presses, while a more recent conventional example is UPM Raflatac's Void Text White TC with a 53-micron caliper (it complements the



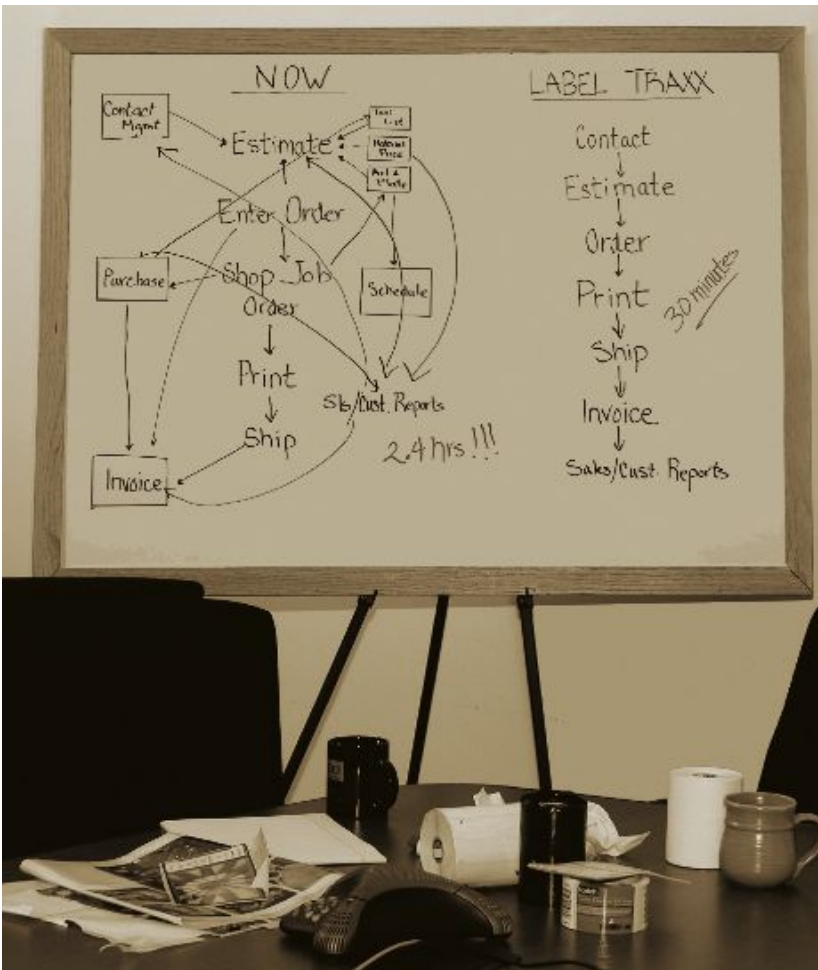
RAYOFACE CZPA from Innovia Films is said to offer the high clarity and excellent conversion properties of a BOPP film with the squeezability of a PE film

SOME PE AND PP BASICS

Polyethylene (PE) and polypropylene (PP) are the two main polyolefins that account for most of filmic labelstock volumes. They also play a key role in the narrow web flexible packaging market, along with polyester (PET) and some PVC, depending upon application. Products include shrink/stretch sleeves, wraparound labels, in-mold labels, rigid or semi-rigid tubes, pouches, sachets and resealable packs.

PE has good printability and die cutting characteristics. The lower or medium density grades have good tear resistance and conformability, making them ideal for labeling squeezable and irregular-shaped containers without creasing. PP films also print and die cut well, but have superior rigidity and transparency. (PET is a better choice for ultra clear applications that also require durability.)

Orienting, or aligning, the polymer chains in biaxially-oriented polypropylene (BOPP) production restrict elongation to stiffen the film. The webs are stretched in both the machine and cross directions. Stretching the soft plastic web only in the machine direction produces mono-oriented polypropylene (OPP) packaging films. Both types are widely used for roll-fed wraparound and shrink labels, cut and stack labels with hot-melt adhesives, and in-mold labels for injection-molded plastic containers. They come in clear, white and metallized coated or non-coated grades for numerous food and non-food packaging applications.



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company's new Security White TC, a PE facestock that splits internally to damage the label if removed).

Several proprietary films are available for specialized pressure-sensitive labels and tapes, including Kapton, a polyimide film developed by DuPont. These are tough products, but Madico Graphic Films, a supplier of durable labelstocks, claims its new gloss white polyimide film is tougher. It is supplied in 25 and 50 micron thicknesses, principally for producing thermal transfer barcode labels for printed circuit boards. It is said to remain dimensionally stable during the extremely high temperatures associated with the lead-free soldering of components. The film maintains its whiteness, barcode readability and adhesive performance when exposed to temperatures as high as 300 deg C. It also withstands the use of infrared, as well as harsh chemicals, at the post-construction stage of circuit board assembly.

Labeling motor oil containers always requires a careful match of facestock and adhesive. Mactac offers a new take on this with a construction comprising its non-coated White Gloss Macthene 1029, a 93-micron PE film coated with a new high performance MP 201 hot melt adhesive. A scarcity of raw materials for its traditional Mactac MP 450 adhesive resulted in a two-year lab and field testing program involving cheaper and more environmentally-friendly raw materials.

BIODEGRADABLE ISSUES

Reducing and recycling packaging materials are core subjects in respect of sustainability. In the context of this article the main issue centers on the efficacy or otherwise of the non-oil products. Primarily these are polylactic acid, or polylactide (PLA) films made from corn starch (sugarcane). The leading supplier of these biopolymer resins to film and plastics manufacturers is NatureWorks LLC, a joint venture between the US conglomerate Cargill and Teijin in Japan. One of its major customers is Plastic Suppliers, which manufactures PLA films in several plants in the USA, as well as in Belgium. Its EarthFirst brand is used for flexible packaging, window cartons, tamper evident bands and shrink sleeve films.

PLA label and packaging films offer many favorable characteristics, but some pundits question their efficacy in terms of biodegradability and composting. For example, Terry Robins, a UK-based retail packaging consultant, points out that PLA films require industrial high-temperature composting units. Care must also be taken in their recycling: 'PLA is a clear, brittle material with similar aesthetics to PET, but mixing the material with PET can wreck the recycling process.' He further adds that PLA films do not have a good gas barrier. Also, their melting point is low, although he says current development work should rectify this.

Composting is not an issue with NatureFlex pressure-sensitive grades

says Innovia Films. Available as clear, white or metallized films, they are made from renewable wood pulp. The films meet the EN:13432 and ASTM D6400 standards including disposal in home-composting environments at ambient temperatures. NatureFlex's printability, die cutting performance, dispensing efficiency and stability during conversion processes are said to resemble those of BOPP films. Unlike conventional PE or PP labels, NatureFlex clear labels will wash off from returnable glass and plastic bottles when used with a caustic removable adhesive.

Another take on sustainability is Fasson R-PET50 Clear from Avery Dennison. As the industry's first recycled film facestock, it is made from a minimum of 80 percent post-consumer waste PET. The 50-micron material comes with a choice of two adhesives, which meet international food labeling regulations, and a white glassine release liner. R-PET50 is said to deliver the same print quality as virgin PET.

As a postscript, Robins says it's worth keeping an eye on polyhydroxyalkanoates (PHA) and polyhydroxybutyrate (PHB). They are also polyesters, but manufactured by feeding bacteria on starch prior to harvesting when ready. 'These materials are in their infancy, but are being closely watched. They have yet to be developed in a clear form, but are highly versatile and thermoformable. PHA/PHB is garden-compostable and even marine biodegradable. These products are the plastics of the future.'



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Comprehensive technical guide for shrink sleeves published

MIKE FAIRLEY reports on a new book from one of Europe's pioneering shrink sleeve innovators

It is now some 50 years since shrink sleeve labels were first invented by Fuji Seal in Japan. Today, this 360°, high quality labeling technology has been used by blue chip companies as diverse as GlaxoSmithKline, Unilever, Britvic, Muller, Nestle, Heinz, Henkel, Sara Lee, Coca Cola, ICI Paints, Del Monte, Campbells, Campari, Scottish Courage, L'Oreal and Colgate Palmolive. As a process it continues to grow, with new innovations and opportunities creating ever more new markets and applications. So why has the process been so successful and how has it proved to be a cost-effective solution for leading brand owners?

It is to provide answers to such questions – and many others – that one of Europe's pioneering shrink sleeve innovators has written a technical guide book which sets out his comprehensive knowledge and experience for shrink sleeve converters, end-users and also for film manufacturers, application machinery and shrink tunnel suppliers. Based on the major role he has played in the technical and market development of shrink sleeving over the past twenty-five years, Sia Memarnia has produced a 237-page hard-cover A4 book with over 120 color illustrations which contains valuable information for everyone in the sleeve supply and usage chain.

Concentrating on areas where there is a major lack of technical know-how, rather than the basics, the book has chapters on topics such as shrink sleeve films, sleeve application, the printing and production of sleeves, heat tunnels, taking costs out of the process, tamper-evidence, promotional shrink sleeves and some of the widely held fallacies about the process.

Having worked in the labeling business for 25 years in

senior technical, business development and technical sales roles, Sia Memarnia certainly has a complete understanding of all aspects of shrink sleeve technology, including different film types and properties, shrink sleeve print and conversion, different application machinery and heat tunnels, and this shows in the book.

"There are also parts of the book that are likely to be controversial, but it is intentional. Many shrink sleeve suppliers are likely to be surprised by what they read"

'Most companies using shrink sleeves or producing shrink sleeves do not fully comprehend the significance of such a technical guide,' he told Labels & Labeling, 'and the fact that if it saves them just one small credit note a year it has more than paid for itself!'

'There are also parts of the book that are likely to be controversial, but it is intentional. Many shrink sleeve suppliers, film makers, machinery suppliers and tunnels makers are likely to be surprised by what they read as it is, in some cases, the precise opposite of what they practice! Once they read the book and comprehend it, they will change their approach. The book will also empower the end-users so that they no longer need to rely solely on the advice of their suppliers, which is by definition subjective.'

In short, this valuable technical guide is designed to take the mystique out of shrink sleeves and empower the

reader to improve product quality and consistency, reduce errors and take costs out, while maximizing the benefits derived from shrink sleeves.

Sia Memarnia's experience, condensed into the book's 237 pages, includes a total of 12 years with Smurfit Labels, working as divisional director of business development and responsible for developing their shrink sleeve business. Then in 1986, Sia was the first UK employee of Fuji Seal Europe (part of Fuji Seal Group which invented shrink sleeves), and worked for Fuji Seal Europe for a total of 13 years as senior technical manager and also senior sales/marketing manager.

During his time with Smurfit Labels and then with Fuji Seal he played a key role in the innovation and introduction of the first UK production of gravure printed sleeves, the European launch of vacuum-metalized sleeves, the introduction of full length sleeving of narrow neck beer bottles, the first application of translucent full length shrink sleeves, the first acid-etched sleeves with an anti-scutting finish, the first introduction of recyclable shrink sleeves for PET containers and has extensive experience in using sleeves to take costs out of containers, as well as making a major contribution to winning over 40 significant packaging awards for innovation.

Today, Sia Consulting is believed to be the only specialist shrink sleeve consulting service with the experience and the ability to provide effective and meaningful support to current/potential users of shrink sleeves, producers of shrink sleeves, film suppliers, application machinery suppliers and packaging design companies in all aspects of shrink sleeves. This includes full technical project evaluation and implementation, complete technical advice on shrink sleeve specification, application machinery and heat tunnels, and independent technical advice in problem solving. He can be contacted at www.siaconsulting.co.uk



The book can be purchased from L&L's online bookshop at www.labelsandlabeling.com/shop

Inks and varnishes

L&L rounds up the latest developments in inks and varnishes, including new generations of metallic and scratch-off inks, high build screen inks and protective and special effect varnishes

RADIOR FRANCE

METALLIC AND SCRATCH-OFF INKS

Radior France, manufacturer of a full range of metallic ink systems for sheetfed offset, heatset, gravure, flexo and screen processes, has launched a new product range and set up a new distribution company in Germany.

New products include a 'Smart' UV flexo metallic ink claimed to provide excellent transfer and coverage as well as high luster. The company's silver Suprametal UV flexo silver VMP (vacuum metalized pigment) ink and Suprametal UV letterpress silver VMP ink can be used as a replacement for hot stamping in certain cases, says Radior. Radior also specializes in scratch-off inks, and its latest offerings include silver scratch-off 7666 – printed on UV release coating 1050, claimed to provide excellent coverage and clean removal – and silver scratch-off 4004 paired with UV release coating 4003. The latter is a new solvent-based screen scratch-off ink which provides greater opacity for increased security.

FUJIFILM SERICOL

UVIVID VARNISH RANGE

Fujifilm Sericol has launched a line of newly engineered UV topcoat varnishes for the narrow web market, as part of the UVivid family of products. The UVivid 800 Series Varnish Line consists of five different clears designed for different applications and demands. The line includes high gloss, matte, scuff resistant, super scuff resistant and imprint able varnishes.

UVivid 800 Series is compatible with all plates designed to work with UV based inks. Tests have shown that UVivid 800 Series induces minimal plate swell and softening over a 24 hour period - well within manufacturers' suggested tolerances.

UVivid 800 Series has been formulated to adhere to most top coated or corona treated plastic materials with surface tension levels of 38-40 dyne/cm or higher.

GSB WAHL

NEW UV-FLEXO SERIES

GSB has developed a new UV-flexo ink series consisting of different UV varnishes and UV laminating adhesives. The Series 50 UV-flexo ink range has high gloss – especially on uncoated materials – and cures at speeds up to 280 m/min. There are additional pigments available with high light fastness for outside labels. UV varnish 9290 PR has a high gloss and fast curing, with a flexible surface, while UV matt varnish 1016 PR has a smooth surface and low viscosity, with a high degree of stability in the ink tray. UV-laminating adhesive 9309 PR has a high adhesion and is suitable for all OPP films.

Also new is a UV flexo silver, suitable for papers and films, which can be overprinted thermal transfer. For uncoated materials UV flexo silver has high gloss and provides an excellent metallic effect, according to GSB. Also new from GSB is UV Series 6200, a universal UV-ink series for rotary UV-letterpress and offset litho presses which can be printed on papers and all synthetic materials, including PVC, PE, PP films and aluminum foils. It is claimed fast drying, with high pigmentation high gloss and excellent printability.

LABELS&LABELING



PULSE Roll Label Products has launched SFLEX, a UV flexo silver ink

PULSE ROLL LABEL PRODUCTS

UV FLEXO SILVER

Pulse Roll Label Products has launched SFLEX, a UV flexo silver ink formulated to provide pigment stability, long term gloss retention properties, and brilliance while reducing anilox volume. Gary Seward, managing director, said: 'Today's printers are under pressure to supply high, stand-alone graphic impact and metallic ink is one way of achieving this. With SFLEX we have addressed brightness and over-printability issues, as well as the tendency for pigment from silver inks to settle out in the tray. This is an issue that demands constant attention from the press operator.'

Vince Reid, production director of Lincolnshire, UK-based converter Superior Labels, commented: 'We have printed a label for one of the Tesco Finest range of products with the new silver from Pulse. It was brighter, better curing and demonstrated much improved over-printability with the UV flexo black.' Seward concluded: 'SFLEX has been the subject of extensive trials that have proved its pigment stability, gloss retention and reduction in anilox volume, making it an advancement to current technology. It has also passed the climate test demonstrating exceptional long-term stability at higher temperatures. This will enable our customers to both safely store and print with this product in locations with elevated temperatures.'

MARABU

BRILLE SCREEN INKS

Marabu is promoting its latest screen-applied UV varnishes, the UVLB series, for use in braille applications on rotary and flatbed screen printing systems. Since September 2006 it has been mandatory to show the name of drugs in braille on packaging, and legislative authorities across Europe have issued a ruling that the containers themselves must be supplied with tactile warnings for the blind and visually impaired.



MARABU is promoting its latest screen-applied UV varnishes, the UVLB series, for use in Braille applications

'Varnishes for these applications will be judged particularly by their technical qualities, such as ink adhesion and scratch resistance to the substrate, but also chemical resistance, reactivity and flexibility,' says Marabu. 'In particular the rheological and optical standards of UV-cured varnishes are crucial for the perfect printing of haptic finishes or Braille. Extremely high ink deposits with very good edge definition are the main criteria to be fulfilled by a Braille varnish.'

SUN CHEMICAL

LOW MIGRATION, UV SCREEN AND SECURITY PRODUCTS

Sun Chemical has developed a range of low migration inks for the narrow web packaging sector which now includes dedicated UV flexo inks, UV offset inks and UV coatings. The Suncure FLM ink series is designed to match low levels of migration with high adhesion onto a range of commonly used packaging films, 'combined with high speed lithographic printability equivalent to best standard profile products.' Sun reports that demand for UV flexo low migrations inks under the Solarlex LM trade name has continued to grow rapidly in 2008.

Also new from Sun Chemical is a series of special UV screen whites within the Solarscreen range which offer higher flexibility for low weight clear filmic labels, so reducing film distortion during ink curing, allowing register to be maintained. The company is also developing a new range of UV flexo inks which take into account the need for improved hold-out to maximize print quality on lower cost and high recycled content papers.

For security applications, Sun Chemical is marketing a new range of security products specifically targeted at label printing encompassing overt and covert security effects up to the level of unique machine readable taggants.

SIEGWERK

MATT VARNISH FOR SLEEVES

Siegwerk has developed a special matte varnish which enables the exterior of a shrink sleeve to be given a special feel – or to draw additional customer attention by alternating matte and gloss effects.

Here it is important that the varnish survives the shrink process undamaged and is scratch resistant. Based on Siegwerk's 39-3 technology, this matte varnish is claimed to guarantee great flexibility and good adhesion.

Also new is a release varnish for applications such as dry peel labels, formulated with free-radical initiators. Radical-based varnishes are claimed to have a significant advantage over cationics, in that they cure instantly, enabling higher production

speeds irrespective of the air humidity in the machine room, which can sometimes lead to difficulties with the cationic curing process. The varnish has been tested for compatibility with all common plastic substrates, as well as on moderately absorbent materials. The release effect remains undiminished after extended storage of the finished products for a year or more.

FLINT GROUP

SCRATCH OFF UV FLEXO INKS

Silver 'scratch-off' inks that perform their key function and at the same time offer a high degree of on-press convenience in UV flexo printing have been introduced by Flint Group Narrow Web. UV flexo scratch-off inks can be used for all familiar promotional, game card, and entertainment applications, and can be easily removed with a rigid device such as a coin or fingernail. Two qualities are offered, delivering a choice of a pliable, or soft-scratch ink, or a semi-pliable, hard-scratch ink. They deliver the same pigmentation and opacity, but differing degrees of 'scratch-ability'. Properly applied, they have a shelf life of at least six months, making them a strong proposition for long-term promotions. They can be overprinted with a message or pattern to further disguise a hidden message using Flint Group Narrow Web's Flexocure S Pantone black ink with UV silicone additive.

UV Flexo Scratch-off Inks are single-component, press-ready inks with a photoinitiator system selected to allow for improved ink through-cure. Best results are achieved if the inks are used with Flint Group Narrow Web's dedicated UV flexo release coating, which protects the 'hidden message' and provides optimum release for the scratch-off layer.

The inks – which meet relevant international health and safety requirements – have been extensively tested on a variety of substrates, with optimal results on non-porous materials such as smooth coated tag papers and highly-calendered papers, PE, both topcoated and non-topcoated, and topcoated PP.

INX INTERNATIONAL OPENS PRODUCTION FACILITY NEAR CHICAGO

A year after officially announcing the intention to consolidate production of water-based inks, INX International Ink Co. recently opened a new manufacturing facility in Homewood, a southern suburb of Chicago. A larger facility than the ones INX closed in Kalamazoo, Michigan, and in nearby Elk Grove earlier this year, Homewood offers 80,000 square-feet of space and an interesting slice of history to go with its address at 1000 Maple Drive in the Prairie Landing Business Park. This site once attracted national attention as a Chicago sports landmark. It is built on the grounds that housed the clubhouse and grandstand of Washington Park Race Track, which closed after a fire in 1977 and never reopened.

'Our new facility is very impressive and large enough to meet our production and sales goals,' said Jim Kochanny, director of liquid operations, at the Homewood facility. 'It's an exciting opportunity with many advantages, including the ability to better serve our customers and easy access. We are only two minutes from the Halsted St. ramp off Interstate 94.'

The projected capacity of inks and coatings is 90 million pounds in the first year of operation. After some shifting at the Dunkirk, New York plant and the transfer of water production from the Mason Avenue facility in Chicago, INX International's development of all of its water-based products will be in Homewood. The Mason Avenue plant will remain open as a solvent-only facility and will complement the company's solvent operation in Appleton, Wisconsin.

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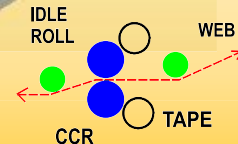
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Recruiting experienced flexo press operators

WITH WORRIES OVER RECRUITING trained press operators regularly topping L&L global surveys, Diane Walters, senior consultant with the Flexo For Hire division of National Printing and Packaging Services, reports on the experiences of a leading recruiting specialist in North America

Flexo For Hire is a specialty recruiting division of National Printing and Packaging Services, Inc. (NPPS). Our experience includes recruiting people throughout the entire spectrum of printing, packaging and converting. This includes offset and flexo. We work all positions from pressmen to presidents.

When we look at the obstacles to staffing and recruiting experienced press operators for the label converters all across the country we start with the overall print/converting industries. As a rule, you all face the same problems.

- An aging average workforce. (Not enough new young blood)
- No outsider awareness of the industry. (Not enough cache to the career)
- A depressed or relatively low pay scale. (Ex-pressmen will accept other work)

Training new young talent, promoting the industry as a career, creating programs to cross train offset pressmen to flexo operators, etc. would certainly help the long term employment situation.

However, on top of these factors, the label converting industry faces another obstacle – geography.

More than most converters, label shops tend to be smaller sized and located in smaller towns. By default that means that there are less skilled competitors within commuting distance of each other. So when you need to hire an experienced pressman you will more likely have to deal with a relocation scenario. But the real world of today is that, at typical flexo operator pay scales, many pressmen will look for work outside the industry before they will commit to moving their families.

We understand that many of you don't believe this is true. But that is because you basically only talk to the candidates who will

consider moving. You don't really ever hear from the ones who won't seriously consider it. We, however, talk to them all.

THIS RELUCTANCE TO MOVE IS COMPOUNDED BY OTHER FACTORS:

- Most operators don't know anything about the other label companies, so it is hard to feel comfortable about the opportunity from a strange company in a new area.
- Most label companies have no preset relocation programs/policies for helping hourly people relocate comfortably into their locations. Many who do have one are essentially token assistance.

Even in larger communities there has to come a time when any good competitor pressmen are either gainfully employed, or they have already worked for you and you won't take them back. Either get used to looking elsewhere or start training more people!

TRAINING PROGRAMS WILL HELP

The upside of any training program is that it will by definition create more experienced workers. The downside is that the trained talent won't always wind up working where you want them to. Much of the time your investment in training someone only creates new pressmen for your competitors to hire shortly after the training is done. After all, each converter has the very real option to either invest in training, or instead to invest in attracting already trained competitors. And let's face it.

Training is often a long and expensive proposition with no guarantees.

Very few flexo/label converters are large enough to create and maintain their own true intake training programs which take inexperienced novices and turn them into pressmen.

Many do have the ability to cross train

pressmen within their equipment lines. And some will stretch and cross train pressmen from litho, etc. But most honestly don't have the time, expertise or interest in training people who don't know how to run their machines without extra supervision. They want and need people who already know not just flexo, but their machines and their media.

It would be helpful if the industry could find more public ways to promote careers in flexo printing and converting, especially at the high school and trade school levels. To most youngsters there is very little awareness of careers in printing or flexo in particular. This is one of those 'hidden' industries which the public never sees and the only people who get into it either had a relative/friend who pulled them in, or there was a plant in their immediate area that was hiring off the street.

WHERE/HOW CAN YOU GET TRAINED PEOPLE?

If you don't want to or can't train everyone yourself, where do you get experienced people? Obviously (at least at the present time) they will have to come from your competitors. And often they will have to come from another part of the country. So let's talk about recruiting experienced people. Not where to advertise to generate candidates, but how to get them to come to work for you.

- **RELOCATION:** You need to understand that relocation is a difficult proposition for most people and their families, both emotionally and financially. Too often employers will say 'If he wants my job he'll get here on his own.' Well good luck with that attitude in a shrinking trained labor market. Or they say 'Why does he need help? He's not moving that far?' Well moving is moving. Costs, deposits, new schools, etc. The mileage doesn't change the depth of the problem.

We recommend that every company sit down right now and prepare a relocation policy that stipulates what you are prepared to pay (moving, temp housing, etc) what resources you have made prearranged agreements with (movers, month to month rentals, real estate agents, etc.) at every level of your company. This is not just about executives or salaried

people any more.

We also recommend that you have your attorney prepare a short and user friendly contract that stipulates that when you hire someone with a relocation package attached, the new employee agrees not to quit and go back home or elsewhere for a reasonable length of time (one year). If they take your money and leave they should have to pay back part or all of your relocation investment.

- **ATTRACTING TALENT:** All too often we find employers who try to treat experienced recruits like beggars from the want ads. Our advice – there are people who come to you looking for a job and those people can be handled however you choose. But when you find experienced pressmen, especially when you have taken the time to go look for them (perhaps even using the services of an industry recruiter like Flexo For Hire) you need to treat these people differently. You need to recognize that you have a potential valuable and irreplaceable commodity at hand and that you need to impress him/her just as much as they need to impress you. You want to insure that they will accept your offer if and when you decide to make one.

Many employers don't know how to play a courting game, especially with hourly positions. They won't give the candidates the priority they need, or the honest quick follow up they deserve. Then they suggest they should happily move their families to a new area with an employer who basically warns them they aren't worth investing in, aren't trusted and will be carefully watched on probation. In other words, most employers never stop to look at things from the candidate's point of view.

Don't leave recruiting success to chance. Along with your plan for who interviews candidates to screen them out, you should also have people and processes designated to help draw them in.

If you can get them to like you and trust you, then you have the option to hire – and probably at better rates.

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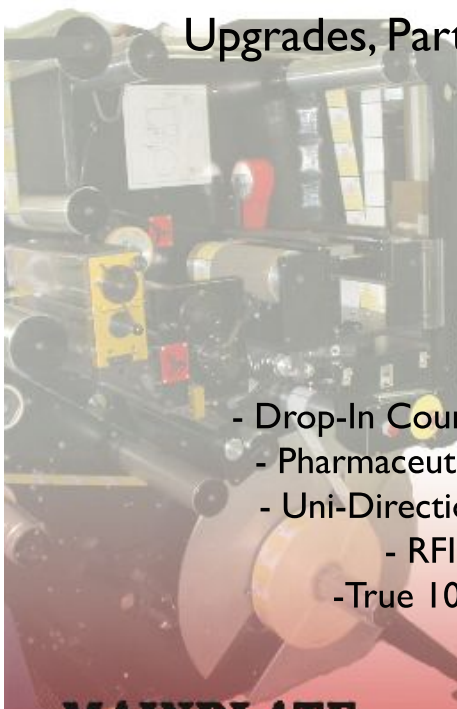
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PATENT WAR

DuPont vs MacDermid

WITH DuPont and MacDermid's battle over thermal plate processing patents still rumbling on – creating uncertainty among existing users and potential buyers – Danielle Jerschefske looks at the background to the bitter dispute

The origin of the DuPont-MacDermid patent battle dates back to April 2006 when DuPont filed a patent infringement lawsuit against MacDermid Inc and MacDermid Printing Solutions LLC.

DuPont, manufacturer of the Cyrel Fast thermal flexographic plate technology, claimed that MacDermid's Lava thermal development equipment and its digital MLT and Magma printing plates violated DuPont's United States Patent Nos. '859 and '758.

In October of 2006 DuPont moved for a preliminary injunction which would have required MacDermid to cease production and sales of the equipment prior to a final determination of the court. The District Court, on August 13, 2007, denied DuPont's claim for a preliminary injunction yet noted that 'MacDermid had not disputed infringement'.

With many patent infringement lawsuits, the defendant will first defend why they are not infringing the patent, and secondly, search for evidence to support invalidity of the existing patent. Such is the case with this suit. MacDermid's claim of invalidity, citing priority (the date a patent is filed) was next moved to the Court of Appeals for judgment.

Some background information: a provisional application (see figure 1) for '859 was filed on March 6, 2001 with a non-provisional application (see figure 1) filed on February 27, 2002. The patent was issued on August 10, 2004. However, the issued patent did not reference the provisional application – as legally it must. The PTO (Patent and Trademark Office) recognized the mistake and subsequently a Certificate of Correction was issued in July 2005.

The significance of this corrected reference became vital to

the case, since with the reference in place, the patent could hold the priority date of March 6, 2001. When taken to the US Court of Appeals in May, the court found that the patent '859 does indeed hold this priority date.

DuPont first demonstrated its digital workflow at the September 2000 Labelexpo, making this the critical date (see figure 1). Now this is important – from the date that an invention is put on sale or demonstrated at a tradeshow, the inventor has one year to file for a patent, or a claim cannot be made. Since the Appeals Court judgment holds the priority date at March 2001, the patent cannot be invalidated citing 'public use' – another argument strongly made by MacDermid's attorneys in addition to priority.

Once the Court of Appeals made this judgment in May 2008, the case was directed back to the district court 'to consider MacDermid's remaining invalidity and unenforceability challenges in light of the correct priority date, as well as the remaining preliminary injunction factors'.

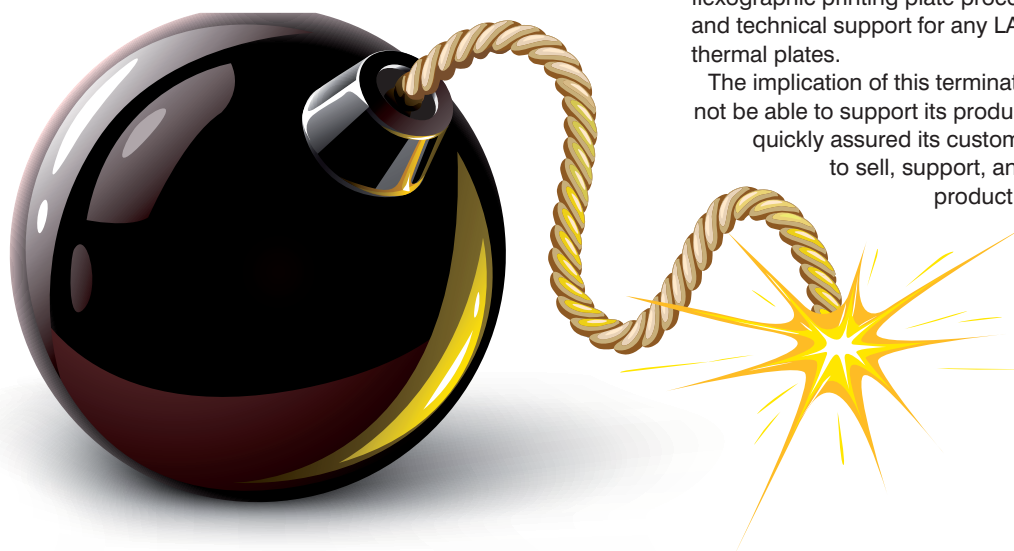
During the time of the Appeals case hearing, MacDermid too filed a patent infringement lawsuit against DuPont. As stated in a MacDermid press release in September 2007, the company claims that, 'DuPont has manufactured, used, offered for sale and sold flexographic plates...that are covered by a MacDermid US patent related to digital photopolymer plate technology.'

Dr Timothy Gotsick, director of innovation at MacDermid, said: 'MacDermid has made a substantial investment in developing its digital technologies and must protect this very important intellectual property.'

So where does this battle currently stand? DuPont established an agreement with Cortron Corporation (in July 2008) to 'immediately cease manufacturing the LAVA thermal flexographic printing plate processors' and to cease service and technical support for any LAVA machinery used to produce thermal plates.

The implication of this termination was that MacDermid would not be able to support its product line. However, the company quickly assured its customers that, 'it will continue to sell, support, and service its entire thermal product line, including the processing equipment.'

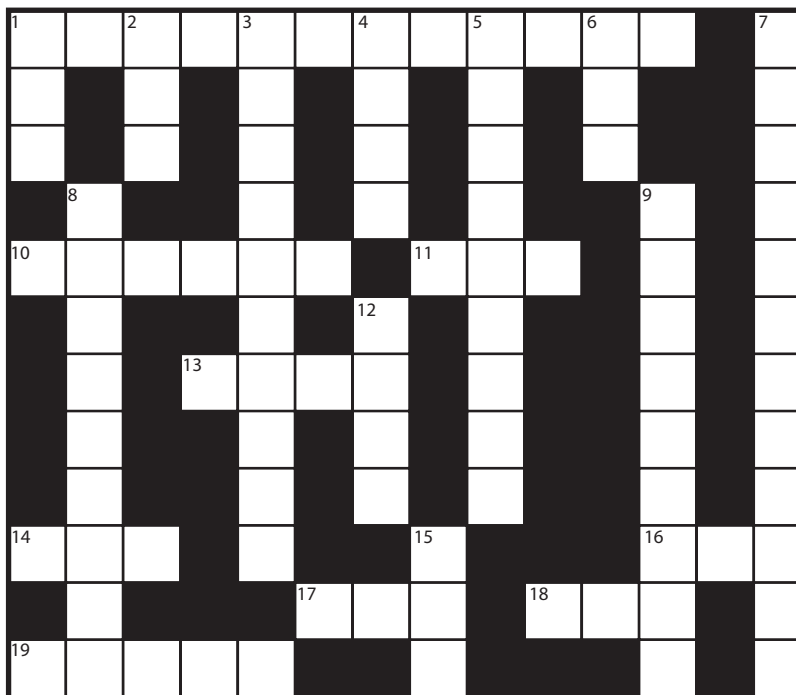
MacDermid, in line with the patent infringement suit, filed a counterclaim 'in an effort to curtail what MacDermid believes is inappropriate competitive activity by DuPont', listing allegations such as attempted monopolization, competition suppression



If you can't complete this crossword...

DOWN

- 1 The individual element in the halftone printing process (3).
- 2 The contact point between two driven rollers (3).
- 3 The image transferred from the printing plate or cylinder to the label substrate (10).
- 4 Occurs when the adhesive squeezes out from under the backing in a pressure-sensitive laminate (4).
- 5 The process of raising a design or image above the label surface using a set of matched male and female dies (9).
- 6 Estimated time of arrival (3).
- 7 A set of characters or bars in a bar code which represents both alphabetic and numeric characters as well as symbols (12).
- 8 The areas of a printed image which are nearest to white (9).
- 9 Metal roller or drum that is cooled internally with water (5 and 4).
- 12 Abbreviation commonly used for capital letters (4).
- 15 Label placed inside the mold before a plastic bottle is blown (3).



ACROSS

- 1 A photoelectric instrument that measures reflected or transmitted light on colors or printed products (12).
- 10 A term used to describe various printing defects, such as spots or imperfections in the printing (6).
- 11 International Organisation for Standards (3).
- 13 The administration in the US Department of Labor that ensures a safe and healthy workplace (4).
- 14 The acronym or abbreviation used for primary colors of light (3).
- 16 A method of reading (scanning) printed text copy with software capable of recognizing and converting the scanned images into an electronic equivalent (3).
- 17 Original equipment manufacturer (3).
- 18 Thickness measurement of thin materials used in some countries (3).
- 19 Material to be printed or converted. Also referred to as the substrate (5).

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and inappropriate restraint of trade.

On October 8, 2008, a Diversity/Breach of Contract suit was filed against Cortron by MacDermid.

In late November 2008 the District Court, for the second time, denied DuPont's request for a preliminary injunction. According to a MacDermid release the court found in its rulings that, 'MacDermid has raised substantial questions regarding whether the '859 patent is invalid' and 'the court concluded that there are substantial questions regarding whether the '859 patent was an obvious combination of elements in the prior art'. DuPont points out that the court ruling also stated: 'The Court notes, however, that the holding should not imply that the record supports a determination that the '859 is invalid, or that summary judgment of patent validity is not possible on a more fully developed record.'

DuPont's vice president and general manager of Imaging Technologies, Linda B. West, said: 'A preliminary injunction is an extraordinary remedy because one is asking the court to quickly intervene before all the evidence is presented. Although the court felt it was premature to grant this relief without hearing all the evidence, we believe that once the court and the jury hear the complete story about how DuPont scientists invented our award-winning Cyrel Fast thermal flexographic technology, DuPont will win a permanent injunction against MacDermid. It is notable, too, that MacDermid has not explained why it took them four years after the first sales of Cyrel Fast plates to reproduce DuPont's "obvious" digital thermal flexographic technology.'

Michael Siegmund, president of MacDermid Printing Solutions said, 'Our philosophy, culture and business practices are such that we would not, and do not, knowingly infringe any patent.'

To be continued...

PHRASES TO LEARN

PROVISIONAL APPLICATION – A provisional patent application allows filing without any formal patent claims, oath or declaration, or any information disclosure (prior art) statement. This expires after one year. It provides a 'patent pending' status.

NON-PROVISIONAL APPLICATION – applications include a specification, claims, drawings (where necessary), an oath/declaration and a filing fee. Once a completed non-provisional application is received, the PTO assigns a filing date to it and eventually begins reviewing it.

CRITICAL DATE – This refers to the date of the initial placing on sale, publication, or public or commercial use of an invention. If by the end of a one-year period, a US patent application has not been filed, one cannot be because the statute bars such filing.

FLEXO NEWS IN BRIEF

ETIRAMA LAUNCHES OFFLINE FINISHING UNIT

Brazilian press manufacturer Etirama has launched an offline finishing machine with stamping and die-cutting capabilities.

The machine has a running speed of 10,000 hits per hour and uses the servo technology contained in some of the company's presses. It can be used as an auxiliary for flexo presses and can also finish digitally printed labels. A lamination unit is optional.

The company reports eight installations since its launch in Brazil last year. As of January 2009, the machine is available in Europe through the company's UK subsidiary.

ZULTEC INSTALLS SIXTH EDALE PRESS

UK-based press manufacturer Edale has recently delivered an Alpha machine for Zultec into its Jeddah plant in Saudi Arabia. This is the sixth Edale press to be installed at the converter, and the third Alpha.

Zultec produces end-of-line packaging, weighing, marking, labeling, food processing and retail management. Established in 1984, the company has extended its operations throughout the Kingdom of Saudi Arabia, United Arab Emirates, Pakistan, Canada and the United Kingdom.

Ali Khan from Zultec explained: 'Despite the many Alpha copies on the market, the "real Alpha" is by far still the undisputed best. Our production is very slick and relies on presses which offer total reliability, with excellent support from the manufacturer. Our presses have to withstand 24 hours a day, seven days a week operation, hence machine quality is a must, otherwise we could not guarantee the overall service to our customers, who rely on just-in-time delivery of labels.'

"BREAKTHROUGH" ON LENTICULAR FLEXOGRAPHY

New technology which enables cost-effective lenticular flexographic printing has been unveiled by lenticular specialist Lenstar. 'While printing lenticular effects on flexographic presses has been attempted before, issues around print resolution, dot size, and press registration have prevented its success,' says Lenstar's Barry Johnson. 'The introduction of higher resolution imaging devices like the Kodak Flexcel NX system, combined with interlacing technology from Pixalen Studio and rolled lens stock from Pacur, has now made lenticular flexographic printing a reality.'

'The Flexcel NX system is amazing. The dot size is so precise – it really works well with lenticular,' remarked Tim Goggins, director of Pixalen Studio. 'We've combined it with our Chromalen technology on three different flexographic presses, and we've had three successes.' The Chromalen technology developed by Pixalen Studio is the keystone. Chromalen eliminates the registration problems of conventional lenticular flexographic printing while simultaneously eliminating 'refresh' or 'parallax shift' in 3-D images. The result is claimed a very clean image with 'seamless depth'.

Pacur, the world's largest extruder of lenticular material has developed a new rolled lenticular stock specifically for the flexographic market.

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CORPORATE CULTURE



RETHINKING PRODUCT DEVELOPMENT: HOW KEY MISUNDERSTANDINGS OBSTRUCT LEAN METHODS

PRODUCT DEVELOPMENT consultant Don Reinertsen looks at how to improve product development

Many companies, especially in the UK, have a dangerously distorted view of Lean New Product Development (NPD), claims Don Reinertsen. He believes that key misunderstandings are preventing companies from exploiting lean methods in product development, and even leading some companies to totally ignore this important new opportunity to improve performance.

The first key misunderstanding is on the nature of waste in product development processes. According to Reinertsen, because the primary focus for much of Lean Manufacturing is the elimination of wasted expenses, many companies incorrectly assume that this is also the focus of Lean NPD. This causes two problems. First, some companies fail to even consider Lean NPD because they assume it is irrelevant if they have already squeezed out most of their inefficiencies. Second, other companies pursue Lean NPD but they focus the majority of their efforts on wasted expenses, which is the most trivial aspect of Lean NPD. Instead, what managers have to recognize is that real benefits of Lean NPD come from creating flow. He states:

'It is only by focusing on flow – not wasted expenses – that they can tap into the true potential of Lean NPD.'

The second key misunderstanding is that lean methods should be applied just as they were in manufacturing. Reinertsen argues that this view is dangerously misguided, and suggests that in terms of creating flow, manufacturing offers only a starting point, and not always a good one. He says: 'The Toyota Production System should be recognized for what it is; an effective method for achieving flow but for a very primitive problem, that of repetitive manufacturing. For more complex environments, such as product development, it only offers a starting point of thinking about flow not the pinnacle of achievement.'

Lean NPD has to be about creating flow, and recognizing the major differences between Manufacturing and Product Development, then it becomes obvious that there many other domains that have tackled the problem of creating flow in a variable process. And, as Reinertsen concludes, "These domains are actually a better source of advanced ideas and methodologies, than the factory floor."

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