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HOW TO INNOVATE

New column from P&G's
global label expert looks
at innovation models

SHRINK LABEL FOCUS

New opportunities open up
for narrow web converters



THE WIDER WORLD OF NARROW WEB

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END IN SIGHT?

If we needed proof of the depths of the current global crisis, then it was confirmed at this year's FINAT congress. FINAT's survey of the European pressure-sensitive materials industry showed that demand in the first quarter of 2009 dropped across the whole of Europe by 7 percent compared to 2008 figures. Even Eastern Europe, which has long been the great motor for European labels industry growth, tilted towards negative territory, with worse figures for the more developed nations.

But there is some evidence that this vicious downturn might not get any worse. A survey of delegates – a good cross-section of the industry in terms of suppliers, converters and end users – showed that around half believed the recession has bottomed out.

An interesting presentation from design expert Steve Kelsey, whose agency handles major global blue chip accounts, demonstrated how key brands had been launched into the teeth of equally ferocious recessions, including Apple, Google and Starbucks. When the upturn came these brands were perfectly positioned for exponential growth. Kelsey's advice was for label converters to act as teams with brands looking to identify markets and create the innovative decoration concepts necessary to launch the next iconic, recession-born brand successes.

On this subject, please make sure you read the feature by our new columnist Paul France of Procter & Gamble, which looks at how to approach the innovation process.

* Also announced during the FINAT congress, Mike Fairley is the winner of this year's R Stanton Avery Lifetime Achievement award. There were generous congratulations for Mike from the judging panel, representing the key international label magazines, TLMI and FINAT. Having known and worked with Mike for the last fifteen years, I would like to add my own congratulations. Mike has been – and continues to be – a formidable resource of knowledge and vision for the entire labels industry and a much respected work colleague.

ANDY THOMAS

GROUP MANAGING EDITOR
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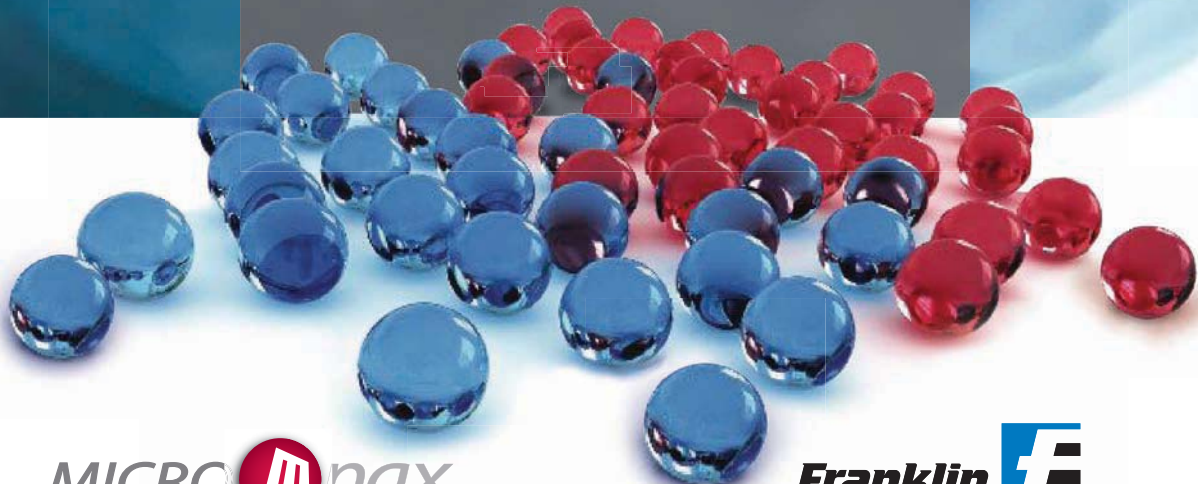
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ISSUE 3

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US MAILING
 Labels & Labelling (USPS No: 002-914) is published
 bi-monthly by Tarsus Publishing Ltd and distributed
 in the US by SPP, 95 Aberdeen Road, Emigsville PA
 17318. Periodicals postage paid at Emigsville, PA.
 POSTMASTER: send address changes to Labels &
 Labelling, 16985 W Bluemound Rd, Ste 310, Brookfield
 WI 53005.

PRINTERS
 Wyndham Grange, West Sussex, UK
 © Tarsus Publishing Ltd

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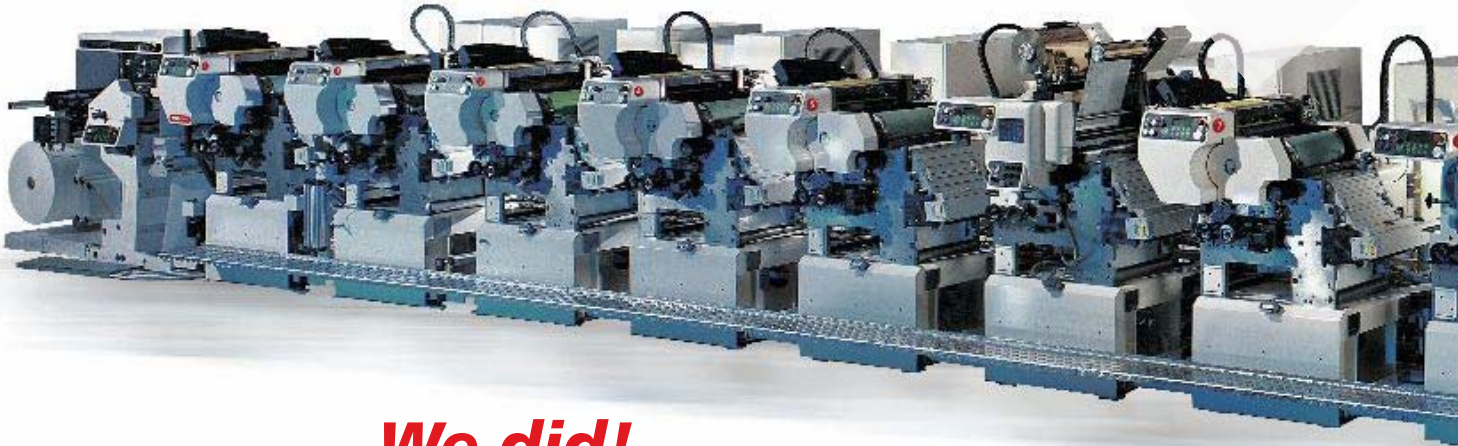
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Lars Eriksen (1994)
President & CEO

*In 1994, when Nilpeter introduced the **MO-3300**, the world's first cassette-based, multifunctional **offsett press for label production**, nobody believed it was needed in the industry...*

M



...We did!



Lars Eriksen (2009)
President & CEO

MO-4



O-3300



Today, everybody accepts as a fact, that **offset printing is a cornerstone** in producing high quality, **value-added labels**. The trend since '94 has been an increased **focus on lean manufacturing** within the label business. And would you believe, our **MO-4, with easy-load, sleeve-based technology**, is the next truly future-proof solution..?

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Do you remember?

1994

- **Nilpeter** introduces the MO-3300 offset press at the company's 75th anniversary.
- **First Macintosh** computers to use the new PowerPC Microprocessors.
- **The Channel Tunnel** opens between England and France.
- **Nelson Mandela** becomes South Africa's first black president.
- **Brazil wins** the FIFA World Cup.
- **The first conference** for the World Wide Web opens in San Francisco.
- **The Oriental Pearl Tower** in Shanghai, China, is completed.

2007

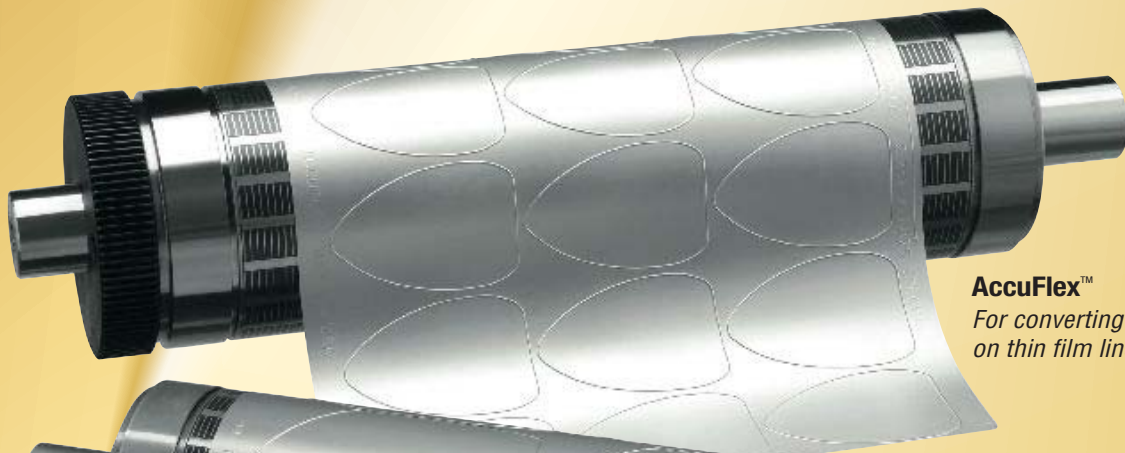
- **Nilpeter** introduces the 4th-generation offset combination press for narrow web: the MO-4.
- **Nilpeter** installs MO-3300 # 250, making it the largest offset base in the world.
- **Apple iPhone** released in the US.
- **The Burj Dubai** became the world's tallest free-standing structure.
- **High Speed 1** from London to the Channel Tunnel is opened to passengers.

2009

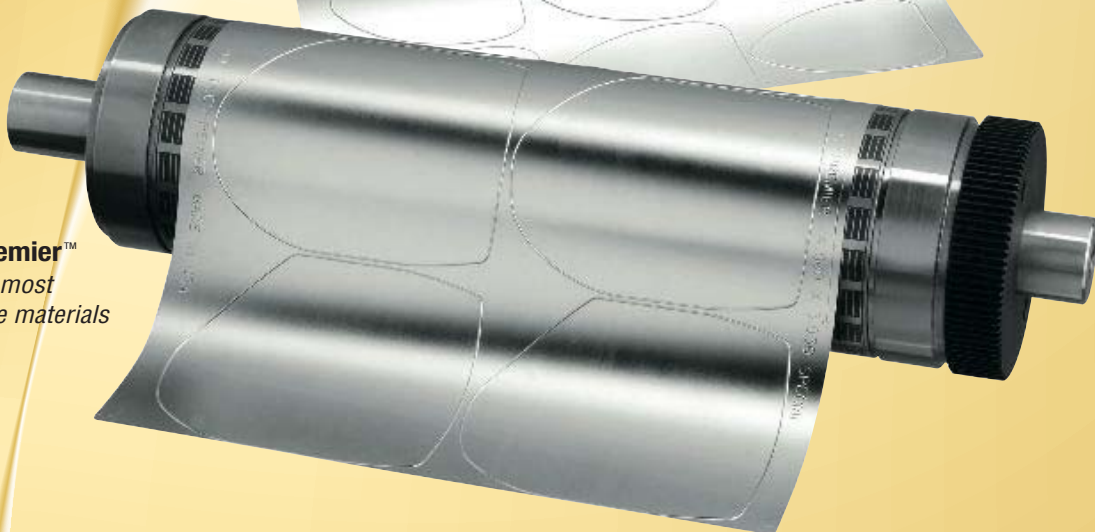
- **Barack Obama** becomes USA's first African American president.
- **Anders Fogh Rasmussen** is the first Dane to be appointed Secretary General of NATO.
- **15 MO-4 presses** have been sold, **7 presses** are already installed.

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INBOX

Roger Pellow, MD Tarsus Labels Group, asked whether label converters regarded themselves as manufacturers or service providers?

Here are two responses.

I don't think it is as easy to label oneself either a manufacturer or a service provider. There are many different degrees of label manufacturing and converting. Our company, for example, considers itself a "value-added converter" because we use our nearly 60 years of experience to help develop the right identification solution for a specific application – from the substrate material to the adhesive to the technology (human readable numbers, bar code and/or RFID). However, we wouldn't consider ourselves a service provider because we do not offer the entire package – hardware, software etc. Instead we have an established network of integrators with whom we work with to be able to provide the total solution to the end user. We feel this enables us to provide the greatest amount of flexibility to our potential customers.

Julia, Metalcraft (I.D Plates and Labels)

What would a service provider be then? In this industry we focus on products not on services. After all, the customer wants a product and wants it as cheap as possible. They have been educated to do that and have never reflected on improving business processes in co-operation with their suppliers and look at Total Cost of Ownership rather than the price of a label.

Arjan

Letter to the Editor: what's wrong with solvent-based adhesives?

In opposition to a noticeable common trend of reducing or even stopping the production of solvent-based adhesives, German VPF still rely on the potential of the disposal of self-adhesive materials on a natural rubber or solvent-based acrylic basis. According to the company management, especially these kinds of combinations are providing classical advantages like good heat resistance and UV durability, excellent resistance to humidity (incl. washing solutions) and high shear strength, making them indispensable in the company's product range. Additionally, the manufacturers and contract coaters from western Germany offer various standard and special solutions from the segments of hotmelts and dispersions. Detailed information is given on request directly by VPF or on www.vpf.de.

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



JV or acquisition

Seeking Label manufacturers/distributors/suppliers to explore potential acquisition/joint venture. Our boutique M&A advisory firm represents an industry client who seeks companies in the label industry (USA based) to explore the benefits of an acquisition or joint venture opportunity. Ideal candidate would have sales of \$2mm to \$15mm.

Ideas, referrals, suggestions welcome!!

George Hubner

*Landmark Business Ventures, Inc.
ghubner@landmarkbv.com*

'Anti-Wet' Agent for shrink sleeve films

Looking to find a source for a good anti-wetting' agent for use in a water-based flexo environment in the production of shrink sleeve labels. Anti-Wet agent or similar solution needs to be applied so that sleeves maintain an 'ultra-clear' appearance after being shrunk on to glass container via steam tunnel.

John Murphy

*Senior accounts manager
Color Craft Label | Flexible packaging Division*

Zero impact

We've been able to reduce our trash/waste by 99 percent and have become a supplier to IPPC who manufacture Enviro-Fuelcubes which are burned in power plants instead of coal or oil. What was formerly our trash has now become feed stock for a finished product and reduces our impact on the environment to near zero.

Rosemary Hausmann Joralemon

Director of sales & marketing at Info Label Inc.

A message from the editor

We welcome comments on any articles in Labels & Labeling, which can be posted onto the blog at the address at the bottom of this page, or sent to me directly at athomas@tarsus.co.uk. There are also a number of new facilities well worth checking out at www.labelsandlabeling.com, including an expanded news section which allows you to link to every story we have written about a given company in the last two years, and a jobs board. Much more is to follow in the next few months, so make this your home page and don't miss out!

Andy Thomas.

NEWS



L&L EXPANDS GLOBAL PRESENCE

Labels & Labeling is demonstrating its commitment to global coverage of the labels industry with a series of announcements, including new presence in Latin America and China, the addition of an expert end user columnist and the creation of an industry-wide online networking group.

Labels & Labeling deputy editor James Quirk has relocated to Buenos Aires, Argentina. Quirk, who speaks Spanish and Portuguese, has been writing for L&L for three and a half years and has developed a particular expertise in Latin America. As well as continuing to contribute to L&L, Quirk has launched an online newsletter dedicated to the Latin American market, translated into Spanish and Portuguese, and will help to develop Labelexpo events in the region.

At the same time, L&L has announced the appointment to its Shanghai, China office of Liu (Kevin) Tao. Kevin has a post-graduate major in Printing Engineering from Jiangnan University, and previously worked in technical sales support and customer training for a major computer-to-plate manufacturer in China. As well as his expertise in pre-press, Kevin has worked as technical representative for an international paper board company.

L&L has also appointed a new editorial team member based in its London office. Elinor Zuke has recently completed a post-graduate journalism degree and will help the magazine further develop its European coverage.

Roger Pellow, managing director of the Tarsus Labels Group (publisher of Labels & Labeling), commented: 'The appointment of Liu (Kevin) Tao and James Quirk's move to Latin America demonstrate our commitment to coverage of the labels industry in two of the world's fastest growing regions.'



MIKE FAIRLEY addresses delegates at the Digital Label Summit, Barcelona

MIKE FAIRLEY HONORED WITH LIFETIME ACHIEVEMENT AWARD

Mike Fairley is the winner of the 2009 R Stanton Avery Lifetime Achievement Award. The announcement was made by Global Label Awards judging panel chairman Helmut Schreiner of Schreiner Group at the FINAT annual congress at Anatalya, Turkey.

'Mike Fairley is the guru for our industry, as well for our customers and their suppliers,' said Schreiner. 'He built a bridge into the future for new markets and new possibilities. I would like to say thank you to him for all he has done for our industry, and the Lifetime Achievement Award is the right answer.' Schreiner also praised the other nominees for the award: Jeffery Arippl, Novelprint; Noel Mitchell, UPM Raflatac; and Guido van der Schueren, EskoArtwork. 'These were four persons we were really impressed with.'

The problem is, there is only one award.' Along with chairman Helmut Schreiner, the Global Label Awards judging panel consisted of Andrea Vimercati, Pilot Italia, representing FINAT; John Hickey, Smythe Companies, representing the TLMI; Tony White, representing Etiketten/Narrowebtech magazines and Andy Thomas, representing Labels & Labeling. The Lifetime Achievement Award will be presented to Mike Fairley at a gala evening on the first night of Labelexpo Europe in Brussels, Wednesday September 23.

As well as the Lifetime Achievement Award, the judges selected a shortlist of potential winners in three other categories: Continuous Innovation, New Innovation and European Label Converter of the Year. The winners of these categories will be announced on the gala night.

GROUPE AUTAJON ACQUIRES BOPACK

Groupe Autajon, a converter of folding boxes, presentation boxes and labels, has announced the takeover of the Bopack Group, a printer of pressure sensitive labels and sleeves.

With four sites in France (Rouen, Strasbourg, Lorient and Bazouges), one in Belgium (Wommelgem) and one site in the Netherlands (Zeist), Bopack is one of Europe's leading self-adhesive label converters. 'The integration of Bopack in Groupe Autajon guarantees the continuity of our projects, creates an unprecedented innovative force and gives access to a wider market and more market segments,' commented Marc Boehlen, CEO and principal shareholder of Bopack. 'Our

580 employees can rest assured that this integration offers the best possible chances of future success for their company.'

'We decided to seize this important opportunity,' explained Gérard Autajon, CEO of Groupe Autojon, 'to complete our product range, to increase our international presence and to build on the similarities and synergies between the two companies in order to become a still better performing partner for our customers, especially in these technically demanding products.'

With this operation concluded, Groupe Autajon now employs nearly 3,000 people in 22 sites in Europe and the US, with a consolidated turnover of close to 44M euro'.

PAGO STRENGTHENS POSITION IN ROMANIA AND RUSSIA

The Pago Group has signed long-term co-operation agreements with Gebacolor, a manufacturer of self-adhesive labels in Romania, and Imagency Print, a producer of self-adhesive labels with its office in Moscow.

The deal with Gebacolor aims to strengthen both companies' position in the Romanian market and to create the conditions required for collaboration with multinational clients in Romania and across Eastern Europe as a whole. The long-term plan will include the integration of Gebacolor within the Pago Group.

Pago is already represented in Romania through its own subsidiary in the area of labeling systems, components and total systems for applying self-adhesive labels. Pago Sisteme de Etichetare SRL in Arad manufactures labeling machines and services the national market. This area of business will continue unchanged.

At the same time the Pago Group's co-operation agreement with Moscow-based Imagency Print will see the two partners setting up a logistics network for the joint delivery of high grade decorative labels to multinational companies in Russia.

'As a result of the progressive internationalization of the consumer goods industry, the requirements placed on label manufacturers are becoming increasingly stringent,' said the companies in a statement. 'Cross-border projects and product launches confront the makers of decorative labels with entirely new challenges. Pago and Imagency Print are responding to this demand on the part of multinational clients by engaging in close cooperation.'

FOCUS APPOINTS RUSSIAN AGENT

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Innovation With Passion



(L-R) Felix Egger, VP sales and marketing, Gallus, with Rako directors Matthias Kurtz and Philip Schmidt-Prange

RAKO ETIKETTEN OPENS CHINA PLANT

NEW Hangzhou production site is part of converter's long-term strategy in the region

At the end of March, German-based Rako Group opened its new production site in Hangzhou, China. At the heart of the new production facility is a Gallus RCS 330.

With 1,000 square meters of production space, Rako now supplies high-quality adhesive labels from its Hangzhou plant in Zhejiang Province, around 180 kilometers from Shanghai.

'China is currently one of the fastest-growing markets worldwide,' emphasized Rako's managing director Philip Schmidt-Prange. 'Although we're still a relative newcomer to the Asian market, we are benefiting from our European customer links. Rako is planning for the long term in China. As

a result, the current economic crisis is not affecting us, we prefer to see it as an opportunity.'

The parent company, which was established in 1969 and currently has a workforce of 1,000, is applying the same high quality standards that it uses in Europe to its operations in the Far East. Besides the Gallus RCS 330 and strict product checks, these standards also comprise guidelines on cleanliness and hygiene.

'Our decision to opt for the Gallus RCS 330 was based on several years of outstanding experience with the presses and with Gallus itself in Europe,' explained Schmidt-Prange.



THE INSIDER

A ROUND-UP OF THE LATEST GLOBAL LABEL STORIES

CENVEO ACQUIRES NASHUA CORPORATION

Cenveo has signed an agreement to acquire all of the shares of Nashua Corporation in a stock and cash transaction valued at approximately USD \$44 million.

Founded in 1849, Nashua, with annual revenues of USD \$265 million in 2008, is a manufacturer and converter of label and specialty paper products with 650 employees and manufacturing facilities in California, Nebraska, New Hampshire and Tennessee. Nashua's Label Products Division manufactures pressure sensitive labels for supermarket, prescription, distribution and RFID applications. Nashua's Specialty Paper Products Division is a converter of point-of-sale receipt paper (used in retail, gaming and package identification applications), coated thermal papers (used to manufacture thermal label products) and printable, wide-format media (including the Dietzgen brand name).

The agreement has been approved by the boards of directors of both companies and is expected to close during the summer.

Robert G. Burton, chairman and CEO of Cenveo, stated: 'The acquisition of Nashua brings together two of the nation's most respected printers to strengthen our label platform and expand our product offerings. Nashua's operations both strategically mirror and complement Cenveo's product line and will create immediate cross-selling opportunities for both companies' customers. The acquisition of Nashua, with its storied history and strategic niche product offerings, is an example of how we intend to grow our company by acquiring leaders in high growth sectors of the printing industry. We expect this acquisition to be accretive to earnings.'

Thomas G. Brooker, Nashua's president and CEO, stated: 'By becoming a part of the third largest graphic communications company in North America, Nashua is better positioned to reach the next level of performance and market share growth in the attractive niche markets we serve. Nashua will become part of a much larger business, a business better able to meet the growing and full service needs of Nashua's customers, and use this expanded scale to deliver increased efficiencies and a wider service offering to them.'

NEWS



THE MARZEK Pechatny Dvor facility in Dnepropetrovsk, Ukraine

MARZEK ETIKETTEN ACQUIRES UKRAINE PRINTING HOUSE

Austria-based converter Marzek Etiketten has further expanded its capacity through the acquisition of Ukrainian company Pechatny Dvor (known as Druckarsky Dvir in its native country). The converter, which employs 150 people in Dnepropetrovsk, Ukraine, has been renamed Marzek Pechatny Dvor Llc. At the same time, the company has completed the building of a new industrial digital label production center in Austria, in a 1.5 million euro investment.

'This deal expands the consolidated group turnover of the three production locations: Marzek Etiketten GmbH, Austria; Kner Packaging Llc, Hungary; and the Ukrainian production facility, now totaling 48 million euros [US\$ 62 million],' says Dr Johannes Michael Wareka, CEO and the fourth generation of the founder's family.

As reported in L&L 2, Marzek Etiketten produces high value sheet- and reel-fed labels, both wet glue and self-adhesive, as well as folding cartons in offset, letterpress, flexo, silkscreen and hybrid printing, all in combination with various finishing and security options. The acquisition of Pechatny Dvor brings Marzek sleeve, flexible packaging and rotogravure capabilities.

With a population of 46 million people, Ukraine's per capita label consumption is less than 20 percent of the average



DR Johannes Michael Wareka, CEO and fourth generation of the founder's family

in Central Europe. Marzek, therefore, sees great potential in the Ukrainian market in the medium and long term, and believes it can use its expertise to increase productivity and quality in its new subsidiary. Three employees from the company's Austrian headquarters, with knowledge of the Russian and Ukrainian languages, will be based in Marzek Pechatny Dvor.

Based on the extended product portfolio and the three production facilities, in combination with the existing local and international sales teams, as well as the bonus of a local supplier, there are various new opportunities for cross-selling across, for example, Ukraine and Russia.

Marzek already has experience in the Ukrainian market, thanks to a successful joint venture between 2000 and 2005.

DOW CHEMICAL COMPANY ACQUIRES ROHM AND HAAS

Dow Chemical Company has completed the acquisition of specialty materials and global coatings producer Rohm and Haas. The alliance brings together the coatings portfolio of Rohm and Haas Paint Coatings Materials Division and Dow Coating Solutions to form Dow Coating Materials.

The new Dow Coating Materials is now claimed to be the largest global coatings supplier of raw materials to formulators of architectural and industrial coatings around the world. The new Dow Coating Materials strengthens the company's technology offering for paint and coating customers.

'We have joined together two excellent R&D, commercial, manufacturing, supply chain and technical service organizations – and created a broadened technology portfolio that will enable our coatings customers to bring new and differentiated products to market anywhere in the world,' said Luis Fernandez, vice president of Dow Coating Materials.

CHESAPEAKE UNDER NEW MANAGEMENT

Chesapeake has completed its financial restructuring through an acquisition by private equity institutions Irving Place Capital Management, L.P. and Oaktree Capital Management, L.P. together with the company's management.

The sale effectively marks the completion of the reorganization of Chesapeake's United States operations and its transition from being a publicly traded company listed in the United States to a private company headquartered in Europe. Chesapeake will now operate as a private, independent, global company led by packaging industry veteran Jerry Kerins, who has been named chairman and CEO.

Chesapeake's United States-based businesses will continue to operate as part of the company's global operations, which include 42 sites around the world, including locations in Europe, Asia, South Africa and the United States. The company has relocated its headquarters to Amersham, United Kingdom, where Kerins is based.

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RITRAMA OPENS FACILITY IN MEXICO

Following the successful initial promotion of its product range into the Mexican market, Ritrama has partnered with Mextran to launch Ritrama Mexico, which will provide a full service to the company's roll label converter customers.

The headquarters are located in Mexico City and contain a production facility of 1,000 square meters. Three slitters provide an annual capability of up to 25 million square meters. Additionally, there is a branch in Guadalajara, in the state of Jalisco, that can service the western region of the country.

The company reports that its Mexico team is highly qualified in flexo technologies and is able to provide technical assistance to converters and end users in the development of new labels for all kinds of applications.

**WACKER COMPLETES EXTENSION OF SHANGHAI TECHNICAL CENTER**

Wacker has finished the expansion of its Shanghai Technical Center located at Shanghai Zhangjiang Hi-Tech Park. The facility now houses ten labs for Wacker's silicone and polymer activities, serving a wide range of industries from construction, coatings and adhesives to electronics, textile, cosmetics and home care. The 1 million euro investment is intended to boost the company's local research and development competency and ensure optimum customer support to the Chinese market.

As the sales office and technical center are now under one roof, the sales and

development teams can collaborate more closely to deliver optimum customer support.

The center's expansion is another milestone in Wacker's long-term development strategy in Asia and especially China. 'Even though the economy is going through challenging times right now, Wacker's commitment to the Chinese market remains unchanged,' said Dr Peter von Zumbusch, president of Wacker Chemicals Greater China. 'We will continue to develop the existing local facilities and business here by making more investments in the coming years.'

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PAGO STRENGTHENS POSITION IN ROMANIA AND RUSSIA

The Pago Group has signed long-term co-operation agreements with Gebacolor, a manufacturer of self-adhesive labels in Romania, and Imagency Print, a producer of self-adhesive labels with its office in Moscow.

The deal with Gebacolor aims to strengthen both companies' position in the Romanian market and to create the conditions required for collaboration with multinational clients in Romania and across Eastern Europe as a whole. The long-term plan will include the integration of Gebacolor within the Pago Group.

Pago is already represented in Romania through its own subsidiary in the area of labeling systems, components and total systems for applying self-adhesive labels. Pago Sisteme de Etichetare SRL in Arad manufactures labeling machines and services the national market. This area of business will continue unchanged.

At the same time the Pago Group's co-operation agreement with Moscow-based Imagency Print will see the two partners setting up a logistics network for the joint delivery of high grade decorative labels to multinational companies in Russia.

'As a result of the progressive internationalization of the consumer goods industry, the requirements placed on label manufacturers are becoming increasingly stringent,' said the companies in a statement. 'Cross-border projects and product launches confront the makers of decorative labels with entirely new challenges. Pago and Imagency Print are responding to this demand on the part of multinational clients by engaging in close cooperation.'

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X-Flex platform redefines the market in narrow web printing technology.

Reduce your costs and keep quality up, thanks to its X-clusive features:

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- Vision System – one-touch auto register control
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Innovation With Passion



EUROPEAN TRAINING CENTER FOR VIPCOLOR OPENS IN BARCELONA

California, USA-based VIPColor Technologies has opened a European training center for its VP485e digital label printer. The technical center is located in the Venture Electronics Spain, S.I. building in Barcelona and will provide training skills in digital label printing for the company's network of re-sellers and end users in Europe and the Middle East Area (EMEA) markets as well as service and support of equipment in the field.

Dr Jules Farkas, EMEA sales director, said: 'The technical center will encompass the whole production and supply concept of digital on demand label printing from graphics software to end use label applications in retail and manufacturing situations. Attendees will learn how to optimize production from the VP485e as well as acquire troubleshooting and maintenance skills.'

Robert Guillen, manager of Venture

Electronics, Spain, explained: 'Our company provides R&D services to large companies such as HP and has over 40 highly skilled technicians and engineers working on projects related to inkjet printers. We are pleased to support VIPColor with certificated educational training and demonstrations as well as hands on customer technical consultation.'

Farkas added: 'Our first seminar/training was held for the newly appointed VIPColor re-seller in Barcelona, Impulse Technologies S.A. located in Sabadell. This company and its personnel are now fully trained for the sales and support of the VP485e in the region. A second educational seminar is planned for re-sellers on June 2-3, 2009, culminating in an award certificate in training and technical service for successful candidates.'

KODAK AND XEIKON FORM ALLIANCE FOR US AND CANADA

A new alliance between Kodak and Xeikon enables label printers to extend their web-based businesses with branded online ordering of tags, labels, and other print products. It also simplifies and streamlines production, from order origination on the web, via Kodak Web to Print Solutions, to final output on the Xeikon 3300 digital color label press. The agreement is effective in the United States and Canada.

The agreement sees the integration of Kodak Web to Print Solutions and the Kodak InSite pre-press portal product family as part of a complementary solution to the Xeikon 3300

narrow-format digital label press.

Said Steve Miller, product manager, Packaging Workflow, Kodak. 'Integrating Kodak's web-based systems with the Xeikon press will give label printers the ability to provide new services to existing customers while also attracting new business opportunities.'

'We're always looking for ways to maximize both value and efficiency for our customer base and this latest agreement with Kodak aligns perfectly with this mission,' said Michael V. Ring, vice president of sales and chief marketing officer of Xeikon's North American operations.

THE INSIDER

A ROUND-UP OF THE LATEST GLOBAL LABEL STORIES

ROTOFLEX INCREASES COVERAGE IN LATIN AMERICA

Rotoflex, a manufacturer of converting and finishing equipment now owned by Mark Andy, has expanded its coverage in Latin and South America by appointing new distributors and agents across the region. Previously coordinated by a single, dedicated sales manager based out of the sales and manufacturing facility in Toronto, Canada, the addition of local sales and support agents throughout Latin and South America demonstrates an enhanced dedication to this growing market, with six agents signed on to cover more than 13 countries in the region.

'We have always been dedicated to this strong market,' stated Francisco Soto, Rotoflex sales manager, Latin America. 'This increase of our presence at the local level allows us to tap into additional high-quality talent and support converters more effectively.'

Since signing on the local distributors, more than 10 experts from across Latin and South America have gone through a two-week training session sponsored by MAX, the service and support team of Mark Andy. In this session, service personnel from the region received in-depth training on the Rotoflex product line and cross-trained with the Canada-based service personnel who have been supporting this equipment for more than 35 years. Adam Baer, vice president of service and support, Mark Andy, said: 'We want to service existing and future Rotoflex customers as effectively as possible. By expanding our trained staff worldwide, and implementing processes to make it easier for customers to reach out to us, we are making monumental steps forward in this initiative.'

■ Mark Andy says it has completed manufacture and shipment of outstanding Rotoflex converting equipment orders since the December, 2008, acquisition of Rotoflex International. During the months leading up to the sale, Rotoflex International had accepted down payments for equipment which was never manufactured or delivered. Since the acquisition, Mark Andy has dedicated efforts to fulfill those outstanding orders, honoring those deposits made by these converters.

'Mark Andy Inc. understands the economic strain some of our converters are experiencing,' stated Paul Brauss, president and CEO. 'We felt this was an opportunity for us to step forward as capital equipment suppliers and fulfill these outstanding commitments, in an effort to continue moving the industry forward.'

Service and support of Rotoflex solutions continues to be a focus for MAX, the customer support team of Mark Andy.

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Key features include:

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BONSET AMERICA INCREASES PETG SHRINK FILM CAPACITY

Bonset America has completed its new extrusion line, which is expected to increase capacity by 11 million pounds a year. The expanded line, located in the company's North Carolina manufacturing facility, produces the PETG heat shrinkable films. According to the company's president, Toshio Awatsuji: 'The new line is the world's largest and incorporates state of the art technology to enable us to support our customers with improved quality and productivity.'

TECTONIC APPOINTS AGENT IN TURKEY

Tectonic International has appointed Borden Engineering as distributor of its range of print inspection systems and plate mounting machines in Turkey.

Sheila Harper Jones, managing director of Tectonic International, said: 'Tectonic's strategy is to invest time and technical resources in the very important Turkish market which has the expertise to produce and export high quality print worldwide.'



(L-R) Peter Hoelzle, Wolfgang Ziegler and Mike Ralph

NOVAMELT ANNOUNCES GLOBAL MANAGEMENT CHANGES

The global expansion Novamelt GmbH has led to key organizational changes. The company is a specialist in hotmelt and UV-curable pressure-sensitive adhesives.

Wolfgang Ziegler, global manager of research and development, is promoted to technical director coordinating Novamelt's German and U.S. operations. Peter Hölzle, business manager PSA, is promoted to sales & marketing manager. He will oversee European sales operations after playing a leading role

in the company's expansion in the East European market.

Mike Ralph, business manager, is promoted to general manager of Novamelt-Jowat LLC, the U.S.- based manufacturing and sales division in High Point, North Carolina. Ralph has over 20 years experience in the adhesive industry.

'We congratulate all of those promoted and wish them continued success,' said Harald Braun, Novamelt managing director.

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Peter Glückman,
Managing Director of Ettiketto



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Scandinavian Design & Quality

AVERY ADDS BOARD STOCKS TO RAPID-ROLL PORTFOLIO

The Fasson Roll North America division of Avery Dennison has added four new Tango Advantage board stocks to its Fasson Rapid-Roll portfolio. Converters now have access to a selection of board products available in custom width/length in low minimum order quantities.

Converters can select from light-to-medium weight C1S & C2S Carolina boards, tri-layer C1S Galerie Card and high-gloss C1S Kromekote, along with a line of specialty board products. These Fasson Rapid-Roll board products are stocked in regional distribution centers. Some specifications are available on the Fasson Exact service program.

MAN ROLAND TRIALS NANO APPROACHES TO UV PRINT

Press manufacturer MAN Roland is testing leading edge nano-technology approaches to UV printing through its new Nanocure project. UV systems allow high quality printing on non-absorbent materials such as plastic films that are hard to print by conventional methods. 'However, these advantages are opposed by certain challenges like high energy costs for drying and the possible migration of organic photo-initiators to packaged products,' says the company.

The partners in the Nanocure Project are conducting research to find a new class of modified photo-initiators and UV-curable printing inks, coatings and adhesives based on these factors. 'The project aims at achieving greatly improved efficiency in the conversion of radiant energy, a higher level of environment compatibility, no health hazards, and cost-efficient systems,' said MAN Roland in a statement.

MULTI-PLASTICS ADDS POUCH MATERIALS

Multi-Plastics has added paper and film-faced pouch materials to its mono-web flexible packaging product line. 'As narrow web flexographic converters continue to diversify and expand into flexible packaging, Multi-Plastics has aligned itself with an experienced manufacturer of laminated structures,' said a company statement. 'Converters now have an additional source and choice for these materials at a competitive cost and within quick lead times.'

The stocked C1S paper-faced structure under product code 29PP has a LDPE sealant layer and is available in two basis weights. This product mimics most PFP's that are traditionally seen in the market. This industry standard construction method works across a variety of dry or wet ingredients.

The 4WCP (white) and 4SCP (silver) are film-faced structures with strong printability, 'but vary from the mainstream sealant of choice due to our manufacturer's ability to create highly specialized sealants without adding additional costs,' said Multi-Plastics. 'This co-extrusion process allows us to introduce DiversaSeal sealant technology to the industry, which allows the customer to use one structure for multiple applications.'

Also available by special order are film-faced structures and an industry standard Surlyn sealant layer specified for added strength.

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ENVIRONMENTAL NEWS



GSB-WAHL TACKLES INK MIGRATION FEARS

To ensure its products meet concerns over migration into food packaging, German ink manufacturer GSB-Wahl has checked that all its UV curing products are free of Benzophenone, 4-Methylbenzone, and Hydroxybenzophenone. This follows recent concerns over the identification of hazardous substances migrating from food packaging printed with UV curable inks and varnishes into the filled goods.

In a statement, the company said: 'With regards to the strong market requirements concerning the production of packaging and labels for food applications, GSB-Wahl now offers UV curing products which are free of the above mentioned substances, which so far have been used

as photoinitiators. This applies mostly for UV varnishes, as UV printing inks generally use other substances as photo initiators.'

The company's portfolio includes the following UV inks free of Benzophenone or 4-Methylbenzone: UV flexo printing series 10, 30 and 50; UV letterpress series 6200; and UV offset printing series 6300.

Part of GSB-Wahl's portfolio of UV varnishes has been revised and are now available without the aforementioned substances. This includes the low-odour varnish PR 9426 as well as low-migration high-gloss, matte and hot embossing varnishes. All products mentioned do not contain any Benzophenone or 4-Methylbenzone and therefore meet

the requirements of the food industry for low-migration UV systems for the manufacturing of food packaging.

'However, this requires new kinds of raw materials and special initiators which means that low-migration systems are high-tech products and incomparable with previous systems,' says the company. 'This results in considerably higher prices for such products. To ensure product safety, GSB-Wahl recommends the increased use of such systems.'

New UV systems without Benzophenone or 4-Methylbenzone developed by GSB include UV flexo printing series 70, UV letterpress series 6500 and all UV varnishes.

WS REWARDED FOR LANDFILL REDUCTION

WS Packaging Group has won the Business Friend of the Environment Award for environmental innovation from the Wisconsin Environmental Working Group, an affiliate of Wisconsin Manufacturers and Conference.

WS Packaging won the award in part for its efforts at its Algoma, Wisconsin, facility to keep about 115 tons of waste material per month from the local landfill. The company has partnered with a state firm that turns the waste material into industrial pellets that can be mixed with coal and bio-fuels to heat buildings and generate electricity.

'A main goal of our company-wide sustainability program is to provide products that are environmentally sound throughout their lifecycles,' said Terry Moede, environmental director, WS Packaging. 'We're also committed to becoming a better steward in protecting our environment, which involves conserving energy and natural resources. Taking the waste from one process and turning it into a resource for another is an operational goal we're achieving every day.'

Since the scheme was implemented in mid-October 2008, WS Packaging has kept more than 800 tons of waste from the local landfill. 'Waste conversion programs require additional operational and transportation costs,' Moede said. 'But WS Packaging is committed to implementing long-term solutions that balance its environmental goals with its economic health.'

WS Packaging has a Corporate Sustainability Committee to further commit each of its 17 facilities to good environmental stewardship. The Algoma facility has served as a blueprint to be followed by each WS Packaging facility across the United States. To this end, the company has implemented lean manufacturing initiatives to cut waste throughout the manufacturing process, switched to energy-efficient lighting, and curtailed paper for internal order processing. It also uses returnable shipping containers whenever possible, among other efforts.

WS Packaging Group has more than 40 years of experience and is one of the largest printing and label converting operations in North America, operating 17 manufacturing facilities.

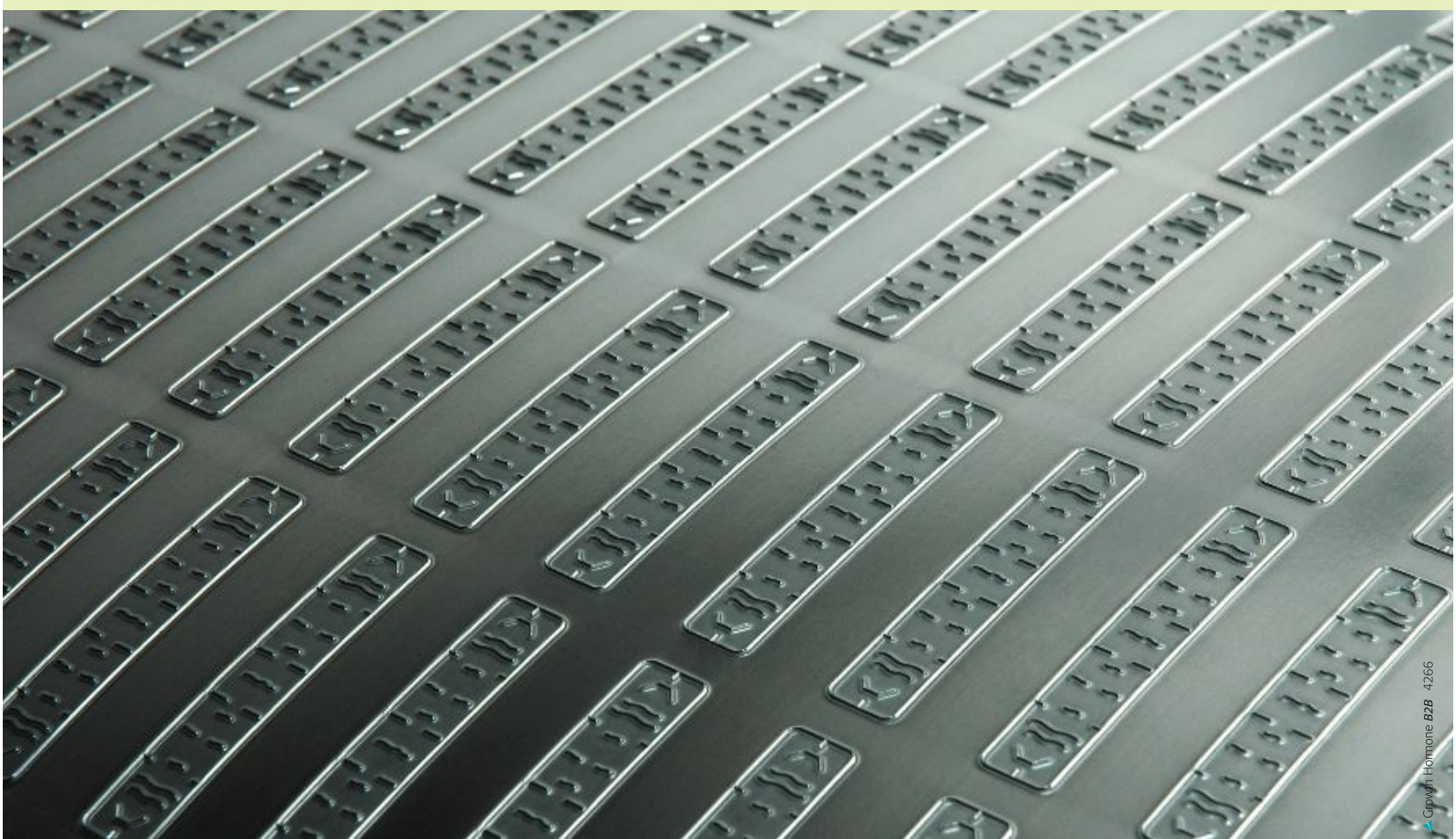


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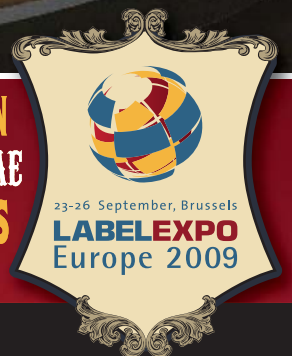
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A Modern Converter's Guide to Sustainability

THE LABEL AND PACKAGING INDUSTRY is in the midst of a 'green' transformation. Danielle Jerschefske reports

In February of 2007 Wal-Mart shared its Sustainability Scorecard (announced in 2006) with its some 60,000 worldwide suppliers. One year later, the retail giant began using the data computed by the scorecard to measure sustainability differences between its suppliers. By year's end it will be introducing the scorecard throughout the Americas, including Canada, Mexico, Central America and Brazil.

The retailer is using the 3Rs – reduce, reuse and recycle – to achieve its long-term environmental goals. First, it is working to reach zero-waste by 2012. Through packaging reduction and recycling efforts at stores throughout the US and the Americas it is making respectable headway.

Its second goal is to supply all areas of the business with 100 percent renewable energy; Wal-Mart has invested in solar panels for its stores in California and Puerto Rico and uses over 365 wind turbines in Mexico.

The retailer's third goal is to sell environmentally sustainable products in its stores– phosphate-free detergents (Ariel EcoMac in Brazil), concentrated soaps (P&G's Cheer) and blankets made from polymerized water bottles collected from its recycling centers in Brazil.

P&G, likewise, now regularly includes environmental waste in its manufacturing process evaluations. As an example, the company reaped significant cost savings by removing water from its laundry detergents. By reducing the size of its containers it was able to ship 2x concentrate product that also reduced CO2 emissions by 100,000 metric tons/year. The

company now uses 40,000 less trucks, 15,000 metric tons less packaging and removed 500 million liters of water per year.

As the folks at Wal-Mart say: 'where's there's waste to be removed, there are savings to be made'.

DEFINING SUSTAINABILITY

While there is no question that global brands and retailers are taking environmental sustainability seriously, their supply chain is faced with a confusing multiplicity of environmental standards and metrics.

Recently, a number of trade associations joined to form the SGP Partnership, while the TLMI has developed Project L.I.F.E. Although the metrics of Project L.I.F.E. and the SGP are different, there is agreement on the basics: 'Sustainability' has four core aspects: energy, water, waste and air emissions. Critical additional categories are: land use, resource consumption, transportation, building and social impacts.

PROCESS RE-EVALUATION

As the industry continues down the path of sustainability, many are looking at process improvement systems/supply chain guidelines as a profitable Green tactic. The FTA released the latest edition of FIRST 4.0, its qualification program for the flexo printing process from design to final product at this year's annual meeting. In addition to guidelines for improved color consistency, increased throughput and reduced waste and downtime, this new version includes an expanded design

chapter, educating designers on how to optimize the flexographic manufacturing process.

This point was emphasized by Ian Hole, VP marketing and development at EskoArtwork, speaking on sustainability during the FTA technical sessions. Hole explained the benefits converters can realize by working closely with end users at an early stage in the design process:

'First, right-sizing should be used in the CAD/CAM toolbox to design smaller packaging from the beginning. Next, virtual prototyping can be used for quick reviews, all on the web, without having a hardcopy proof, expediting the approval process and reducing paper consumption.' Hole said the predictability of color-managed proofing can get a sign-off the first time, while the latest screening technologies help reach the desired color saturation with less ink consumption.

2009 FTA ENVIRONMENTAL EXCELLENCE AWARD WINNERS

Suppliers: AllpakTrojan, Coating Excellence International LLC

Converters: Creative Labels, Lauterbach Group.

Automated layout software can be used to save space on the plate, while plate cut and mounting systems that confine plate usage to the image area only further reduce errors and wastage.

FOCUS ON SUSTAINABILITY

Hole was one of a number of speakers at the FTA forum who addressed the theme of printability, sustainability - and the all-important link between the two

■ SUBSTRATES

In a session which evaluated both the printability and sustainability of non-polyolefin films, CalPoly professor Malcolm Keif presented data on the school's testing of the corn-based biopolymer PLA. CalPoly conducted two trials. The first looked at the consistency of clear and white PLA against clear PET and OPP, specifically looking at mottle, dot gain, highlights, dot roundness and surface energy. The IGT F1 flexography tester at .2m/s with a digital plate and water-based inks were used. Results showed that dot gain and surface energy were closely related for all substrates tested.

The second analysis was completed on a narrow web press running 50 f/min

with a digital thermal plate, water-based inks and no film surface treatment. The same matching results were seen.

In the final rankings of printability, the numbers for the white PLA matched the numbers for PET. The conclusion: 'the printability of PLA appears comparable to other common flexible packaging films.'

■ PLATE PROCESSING

The different sustainability profiles of water-wash, thermal and solvent plate wash systems were reviewed next. Paul Zeinert of Anderson & Vreeland said that water-wash plates have a significantly better environmental profile than solvent plates, while the quality of water-wash plates had greatly improved: 'Today, water-wash can achieve the same image resolution as analog or digital with less than 1 percent dots at 250 ls; they work with solvent, water or UV inks and substrate thicknesses of .03 - .125mm.'

A&V's research showed that water-wash plates can be finished in less than 60 minutes, requiring significantly less drying time. They can be reused and release no VOCs.

Chris Worachek from MEGTEC Systems looked at ways to reduce

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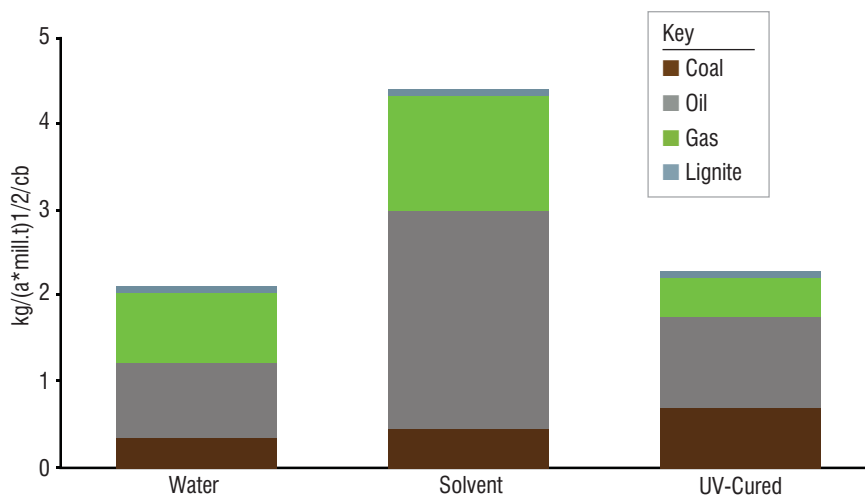
energy usage, citing firstly the importance of preventative maintenance of basic manufacturing equipment such as air filtration systems. Woracheck pointed out that a high efficiency air bar reduces airflow and the amount of exhaust emitted. 'Check your permit to see the requirements of running air through the oxidizer when using water-based products,' he said. 'Quite often you are not required to do this.' This is a simple way to reduce energy.

FLEXO INK SYSTEMS

David Roey of Max Daetwyler Corporation argued that the impact of solvent-based ink systems can be reduced by distillation – turning waste solvent into clean solvent. Roey said flexo converters can invest in distillation at three different cost levels: manual, semi-auto and automatic, with the potential to cut new solvent costs in half.

At the 2009 NEHS conference, Chemical company BASF presented a review of flexographic inks systems based on the eco-efficiency model of analysis which takes account of the economic impacts of a product or service. The study (see fig 1) compared water-based, solvent and UV flexo

FIG 1. NATURAL RESOURCE CONSUMPTION



inks, which were applied on a four-color flexographic CI press with each station printing 25 percent image coverage on .003 mil PE film. Each product was weighted in six environmental categories - land use, energy consumption, emissions, toxicity potential, risk potential and resource consumption - against cost. The research concluded that water-based inks are the most environmentally friendly and lowest cost of the three categories.

It found that solvent inks consume the most energy through their life cycle and use the highest amount of natural resources. Water-based and UV-inks consume roughly the same resources, while UV-cured inks were found to have the worst Global Warming Potential (GWP) because they are powered by electricity and not gas.

Good Reflections



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DEVELOPING AN ENVIRONMENTAL STRATEGY

■ RESPONSIBLE SOURCING

Theresa Vanna of Pace Industries and Laura Maybaum from Nazdar looked at 'responsible sourcing' strategies. They stressed that labels need to be, first and foremost, fit for purpose. Printers must look at the environment their labels are expected to perform in, including conditions of storage and transportation, and the lifespan of the final product. They must then ensure their equipment is qualified to work with the chosen material. Availability of the product is also critical. There may be long lead times that will not fit the customer's schedule. Finally, cost must be identified for everything involved – raw materials, process, transportation and disposal.

The key to success is to partner with a responsible vendor prepared to provide education and support, said Vanna and Maybaum. Everybody in the chain should evaluate and qualify the claims made by their own suppliers. A few years into the 'green' revolution, we can now bring together the experiences of organizations which have successfully introduced environmental sustainability programs – and achieved positive results on their bottom lines. Here are the key points:

■ ELECT AN EXPERT(S)

To fully align a converting business with the CPGs, elect someone, or a team, to be the gatekeeper for all

LABELS&LABELING

that is sustainable. This person will be responsible for communicating sustainability initiatives and objectives between the shop floor and the executive office, as well as continuing communication with the customers' sustainability managers. Procter & Gamble, for example, has appointed sustainability experts to nearly all of its leading 300 brands.

■ DEVELOP A COST/BENEFIT MATRIX

Converters should build up a system for effectively evaluating sustainability against cost and performance by creating a matrix that ties in with the company's environmental management system (EMS). This is part of responsible sourcing*

■ BENCHMARK

Although there is no one set of environmental metrics, they do align closely, and it can be useful to understand the differences between, for example, ISO, SGP and L.I.F.E. standards. Standards give a company a means of measuring up against the competition. Of course, certification is not necessary, but it provides a framework that works within an EMS and offers recognition.

■ ASK QUESTIONS

Ask the right questions. A company's leaders and their expert(s) have the task of taking the objectives outlined in the EMS and turning them into practical programs. Knowing what you're looking for and how to ask the right questions

CONSUMER POWER

Reader's Digest, translated into 20 languages and with around 90 million readers, published an article titled Eco-Check in its April edition, which said, 'Soon...we consumers will go from being helpless cogs in a vast machine to being a force that matters.' The article went on to highlight various ways in which consumers could find out the environmental impact of a product.

P&G's own research confirms these trends, with 80 percent of consumers telling the company that sustainability is important. Meanwhile a study conducted by The Freedonia Group predicted that demand for 'green packaging' in the US is expected to reach US \$14 billion by 2013. This number includes recycled content, reusable and biodegradable materials.

to get what you need is critical. Many of the industry's suppliers have programs that will help converters fulfill their EMS responsibilities. Use their knowledge and research for help.

■ LOCATION

Pay close attention to the location of published analytical studies. State, regional, national and continental differences across all key environmental categories can vary greatly and can affect the outcome of your EMS program. For example, a comparison between the environmental profile of converting plants in Chicago and Paris needs to take account of the difference in energy sources. Chicago = coal, Paris = nuclear.



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NEW PRODUCTS



1 SOLARFLEX NOVA SUN CHEMICAL

Sun Chemical has launched SolarFlex Nova, a new ink that is designed to meet the demands of the evolving narrow web market and suitable for a variety of flexo press models.

SolarFlex Nova joins the Solaris System of products and services, a global product line of printing inks, coatings and services dedicated to narrow web printing. The Solaris range, including SolarFlex Nova, caters to almost all narrow web processes including UV flexo, water-based flexo, screen whites and colors, letterpress and lithography.

SolarFlex Nova is claimed to offer quick make-ready, efficient printing and easy print finishing. To provide the exact amount of SolarFlex Nova ink for a given job, an advanced ink management system works together with the associated color tools and the Solaris ColourSat dispenser.

On the press, the new ink has optimized cure and consistent quality enabling trouble-free printing at the highest press speeds. Enhanced hold-out and adhesion allow fewer problems associated with 'difficult' substrates while high color strength permits the use of finer aniloxes which offer the highest print quality, improved ink mileage and greater color matching flexibility. Furthermore, the silicone-free formulation provides the receptivity required for easier print enhancements such as varnishing, foil blocking and variable image printing.

Jonathan Sexton, European sales director narrow web for Sun Chemical, said: 'Our aim is for the Solaris range to provide the best inks and coatings technology that Sun Chemical can offer. The introduction of SolarFlex Nova to the range will enable us to continue delivering the exceptional productivity and innovative total solutions packages that our customers have come to expect from us.'

2 SLEEVE HANDLING AND STORAGE SYSTEM SIMEC GROUP

Simec Group has launched a sleeve handling and storage system called Revolver, which allows sleeves to be safely transferred from the printing press to the cleaning equipment and afterwards to the warehouse. The system also allows more efficient storage without the need to invest in expensive stocking systems.

Revolver has safety rings which fit into each sleeve end when sleeves are removed from the press, and which are aligned to the cleaning machine mandrels.

Besides ensuring a smooth extraction of the sleeves from the press, Revolver helps to keep sleeves clean and protected. The system is currently available for sleeve heights between 800 to 1700 width. The different Revolver versions can work with a from 6-10 anilox or plate sleeves.

Revolver forms part of Simec's Concept workflow, which bring together a number of elements including: a wide range of cylinders and sleeves for flexo packaging applications; Profil series cleaning systems, designed for installation in line with the press or off-line; and covers to protect the sleeves and the rolls from weathering agents and dust. In addition, Simec has extended its Leonardo engraving configurations to produce rollers up to a diameter of 1,100 mm and length of 5,500 mm. with the new engravings from 8 lines/cm. A further element is an electronic guarantee certification (FMRG), issued for each anilox ceramic roll manufactured by Simec, giving information on quality and production repeatability.



3



4

5



3 4-COLOR UV INKJET SYSTEM ATLANTIC ZEISER

Atlantic Zeiser has launched the Gamma 70 4-color UV inkjet printing system. In addition to the traditional target markets, such as packaging and labeling, commercial print, security print and card manufacturing, the new UV inkjet printing system is also particularly suitable for label printing and industrial product identification on substrates beyond the usual paper and cardboard.

In addition to the 360 dpi high resolution and 70.5mm printing width, the system features a variable drop size and offers up to eight levels of grayscale. This ensures differentiated color gradients and shades and is therefore suited to printing four-color texts, logos, graphics and barcodes. Finally, the specially developed AZ controller allows the print speed to be increased up to 24m/min.

'The Gamma 70 even makes short-run color printing an economic option. Atlantic Zeiser can configure stand-alone systems, components for integration in web and sheetfed systems or complete systems depending on the customer's requirements,' explained Ralf Hipp, vice president of digital printing and coding solutions.

4 PAPER BASED ON ROCK MINERALS BAKER SELF ADHESIVE MATERIALS

Baker Self Adhesive Materials has launched EnPLUS, a new paper technology made from rock minerals that can be used across a wide range of printing and packaging applications. 'EnPLUS can be used with a wide range of inks and print processes and has the same printability as conventionally made paper products,' said materials manager David Richards. 'Having similar characteristic to plastic, it combines high scuff and water resistance with additional strength and durability.'

EnPLUS can be used for the production of self-adhesive and in-mold labels, tickets, tags, wide format inkjet printing, signage, display media and any operation where paper and board are used for packaging. It is a photodegradable product that can be added to the recycling process and used again in numerous manufacturing operations. 'Pulp papers are manufactured using approximately 60 percent of bleached wood mixed with approximately 40 percent calcium carbonate that whitens the paper and gives a smooth printing surface,' added Richards. 'EnPLUS is based on natural rock minerals that are constantly replaced by the earth's water systems so its use contributes to the reduction in the number of trees needed for paper production and also helps preserve the environment.'

5 MVP PHOTOPOLYMER PLATE SERIES MACDERMID

MacDermid Printing Solutions has introduced two new photopolymer printing plates, MVP and Digital MVP, the new MVP plate series. This new product family marks MacDermid's fifth and sixth new product launches in just over a year.

MVP, a medium durometer plate, has a high level of resilience, allowing for faster press speeds and reduced bounce, resulting in overall higher quality print and increased productivity, claims the company. MVP is said to work well with a variety of substrates and inks. Digital MVP delivers the same benefits of MVP, plus the fine resolution and imaging capability expected from a digital photopolymer plate. Digital MVP can either be processed in solvent systems or thermally in MacDermid's LAVA processor. MVP and Digital MVP are commercially available in thicknesses from 0.045 in. (1.144mm) to 0.112 in. (2.84mm).

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LABEL EXPOSURE



1

1 TRACO – NURICHE With the installation of the HP Indigo press ws4500, Traco was able to complete a recent project for Nuriche, a manufacturer and supplier of innovative nutritional products, which included the production of three shrink sleeve label designs in quantities of 5,000 and 2,000 sleeves. The customer needed the project turned around very quickly, and with the new press, Traco was able to deliver the complete project in only five days with quality that was superior to that found in rotogravure printing. The sleeves were printed on the HP Digital Press using PVC film.



2

2 MULTILABEL ARGENTINA – BODEGAS TABOLANGO Printed by Multilabel Argentina for the Bodegas Tabolango vineyard, this Cabernet Sauvignon Syrah label was printed on a Propheteer flexo press using water-based silver and black inks with matte and gloss varnish finishing. Hot stamping and embossing were applied in-line.

3. FINAT ANNOUNCES AWARD WINNERS A label for Crabbie's Green Ginger wine – a Scottish drink – printed by Spear UK has won the Best in Show prize in FINAT's 2009 Label Awards (pictured).

Spear UK, based at Cwmbran, Wales, entered the label in the Combination Printing section of the awards, which won it the prize for the best in that section as well as the Best in Show distinction. 'It was outstanding combination printing, using UV flexography, screen printing and hot foil stamping to very good effect achieved in a single pass. The depth of color was effective and white lettering gave an almost 3-D effect,' said Tony White, chairman of the judging panel. The company also won the Silk Screen Printing process prize for its Desperadoes Red label.

Poland's Skanem Introl SA was a close competitor for the top accolade and was awarded a Special Jury Awards for its Sobieski Vodka Diament label. Norway-based Skanem, one of the largest groups in FINAT, also won awards for labels from its Liverpool, UK, and Willich, Germany, plants.

A booklet designed to show off the printer's abilities using UV, flexo, screen and digital as well as scratch-off encapsulated scents, by Stratus Printing France, won the Alternative Uses Group award and an innovative lighting strip which can be used for a multitude of end uses, created by the Schreiner Group, of Germany, won the Innovation award. Using the principle of electroluminescence on a flat, printed circuit, this 'label' can produce 'printed light' by the meter.

White said: 'We had a bumper entry this year – 291 – from 24 countries and awards were made to 41 companies. This reinforces the awards as a globally important competition and shop window for label printers.'

Winners from this competition go forward to the World Label Awards competition, judged in September, which declares the best labels in the world.

The quality of entries was so high that in two categories the judges could not choose the best and made joint awards.

The winners received their prizes during FINAT's annual congress at Antalya, Turkey.



3

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.

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19 August

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A free one-day seminar that focuses on trouble-shooting pre-press and print room problem areas



8 - 10 Sept

TLMI Technical Conference

Chicago, Illinois, USA

The annual Technical Conference from the Tag and Label Manufacturers Institute



11 - 16 Sept

Print and PackPrint

Chicago, USA

Graphic communications exhibition and conference held at the McCormick Place exhibition center in Chicago



14 - 16 Sept

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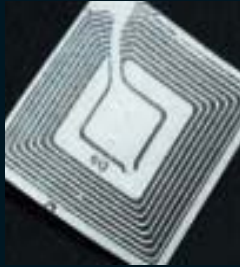
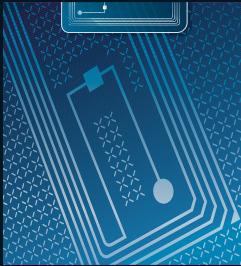


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The importance of machine servicing

DURING TOUGH ECONOMIC TIMES, label converters are tempted to buy cheaper second-hand machines without warranties or service programs. But the cost of machine downtime could outweigh any savings, argues Roger Wey, general manager of refurbished press specialist GS+S Partner GmbH

Printing company owners faced with the choice of investing in a new or used press will make their decision based on available budget, availability of local service support and the requirements of their customers.

But a critical factor, too often ignored, is putting in place a proper service and maintenance program to stop press outage during critical JIT production scenarios.

Just how expensive are such outages for a label converter?

The diagram below shows a simplified analysis of the cost structure of a typical German printing company. The financing costs and those for electricity, waste disposal, service and cleaning remain constant, while the wage bill constitutes the largest percentage of variable costs. A small or mid-sized company of 20-50 employees, typical for most label printing companies, will have a turnover of approximately EUR 6-10 million, of which some EUR 1.8 to 3 million are wage costs.

"A machine failure can keep 80 percent of the staff on tenterhooks in small and mid-sized companies"

A production breakdown affects the entire company. Production works to quickly identify the defect and work is re-planned to avoid shipping additional orders. The general manager must decide whether one order or another should be pushed forward or delayed.

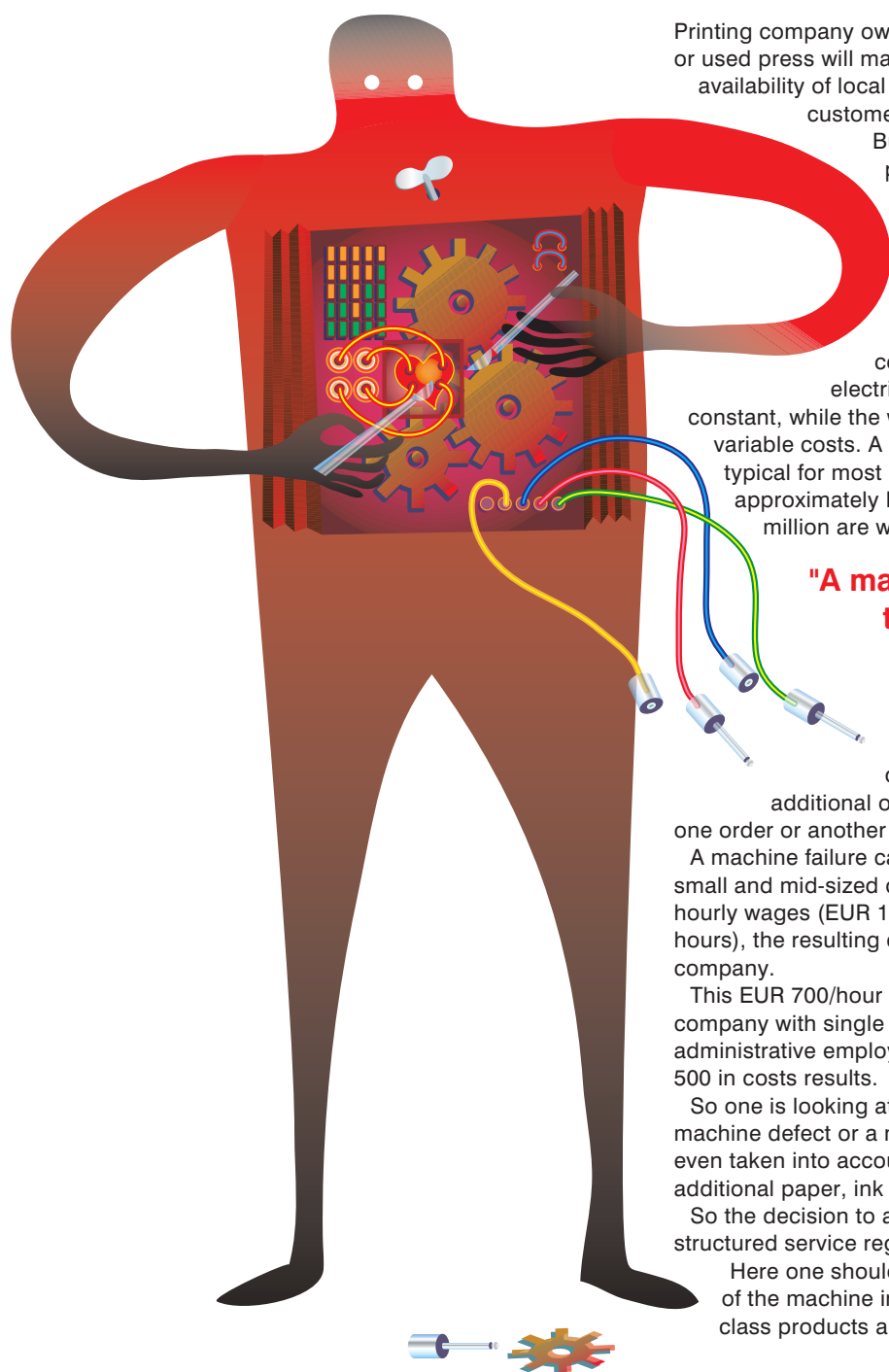
A machine failure can keep 80 percent of the staff on tenterhooks in small and mid-sized companies. If this is converted to the corresponding hourly wages (EUR 1.8 million / 12 = EUR 150,000 monthly wages / 172 hours), the resulting costs are 80 percent of EUR 700 / hour for the entire company.

This EUR 700/hour loss results from a machine outage in a printing company with single shift operation. In a two-shift operation, where the administrative employees are not affected as severely, an additional EUR 500 in costs results.

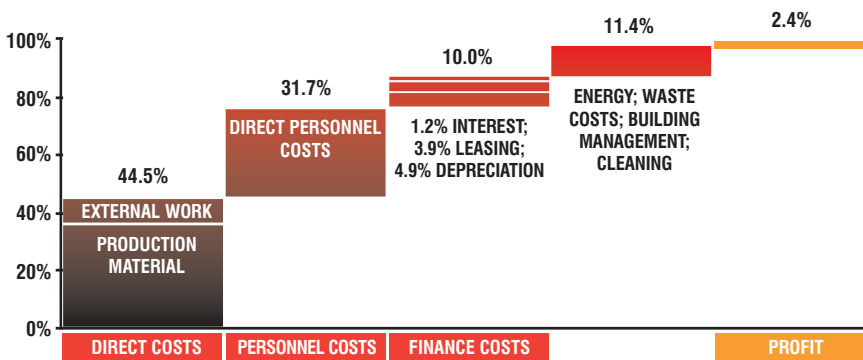
So one is looking at a cost of EUR 500 - 700 / hour resulting from a machine defect or a machine operated incorrectly. And this does not even taken into account the indirect costs of lost production time - additional paper, ink and cleaning agents, as well as re-work.

So the decision to acquire a used machine with a warranty and a structured service regime makes sense for a printing company owner.

Here one should clearly note that the main priority is not the cost of the machine investment, but rather the outage time. Second class products are always tempting at the beginning because they



AVERAGE COST STRUCTURE OF A GERMAN LABEL CONVERTER (SOURCE BVDM 2005)



are more affordable. A premium used machine with a warranty and clearly defined service intervals works out to be the best decision.

The question should always be whether the machine supplier can provide the appropriate service

"Just-in-time production always requires the best employees, with clearly defined responsibilities"

on-site and at the shortest possible notice. If the service engineer can only be available in a few days, this unavoidably results in an irritated customer.

ADAPTING TO CHANGE

Service and security is becoming more and more important in the fast-moving world of the label industry, where today's technologies and machine systems can no longer be seen as 15-20 year investments.

Letterpress printing technology is giving way to flexographic print technology on a daily basis. Today it is possible to achieve 99 percent of letterpress print results with the corresponding pre-press technology in flexographic technology.

As we speak today of flexographic print technology, everyone will be talking about offset technology in 5-10 years, because the printing costs per order only constitute one quarter of the flexographic printing costs. This clearly speaks in favour of offset technology.

We have noticed that in both flexographic and in offset printing, expert press operators are becoming the focus, as they theoretically have to master a range of specialised

disciplines. The use of more complex machine systems requires that they must be either an electrical engineer with printing knowledge, or strictly a printer with pronounced machine operation know-how.

Although machine manufacturers have been developing systems which are easier to operate and which are 'self-learning', just-in-time production always requires the best employees, with clearly defined responsibilities, operating those presses, and this is increasingly the trend in Central European countries.

This all makes machine servicing even more of a priority. Weekly, monthly and annual check-ups guarantee skilled printers that their machines will work without interruption during the critical production scenarios.

In our experience there are three different types of label company owner:

- The first is not interested in the least in the state of his production machines and avails himself of the services of the local support organisation when there is a machine outage.
- The second type gets information from where he can on what can break and then takes the appropriate self-planned actions.
- The third type lets his machine fleet undergo an inspection in a twice-yearly check-up and thereby ensures that always those machine groups are maintained through the wear suffered in anything up to three shifts.

Of these three – which are you?

INSTALLATIONS

A ROUND-UP OF THE LATEST INSTALLATION STORIES

SECURITY PRINT ROTATEK COMBINATION PRESS

Rotatek has installed a second narrow web combination press at the premises of a security printer in the south of India, sold by the company's Indian agent Creed Engineers. The converter's name cannot be revealed.

This 520mm-wide press is equipped with eight offset and two flexo printing units, and was installed in ten days.

The press is interesting because it incorporates a number of new features launched recently by Rotatek. These include a new design of flexo cassette which is installed in the offset towers, allowing a standard offset tower to be changed without tools into a flexo unit while using the same drives and UV dryers. This flexibility allows the printer to switch from an 8 x offset + 2 x flexo configuration to a 6 offset + 4 flexo configuration in just 20 minutes, depending on the job configuration.

Handling of higher grammage papers up to 350 gsm/ 450 microns has also been improved with a reinforced infeed and pulling unit. An Eltromat automatic register control has reduced set-up time and waste.

The machine has capability of adding a hot and cold foil stamping unit, a rotary die cut unit and on-line Kodak Versamark inkjet system, along with the possibility of adding chill rolls to print on shrink sleeves and unsupported films.

JAMES TOWNSEND & SONS TRELLEBORG ROLLIN LIBIX BLANKETS

Bristol, UK-based converter James Townsend & Sons has switched to Trelleborg's Rollin LibiX blankets, supplied in the UK by BFS Pressroom Solutions. LibiX blankets, which are suitable for UV and conventional inks, are now in use around the clock on six and eight-colour Heidelberg Speedmaster 102 presses as well as a six-colour Speedmaster 72 model.

'The LibiX blanket seemed to provide a solution to particular production issues that we were facing on a regular basis,' says works manager at James Townsend, Paul Morris. 'For example, running UV inks eventually embosses blankets, which results in the ghost of the previous job on the first sheets of the next print run. In addition, if a press is left standing for a while and the blanket is cold, the tack level can sometimes reach a point where the sheet is pulled out of the grippers. The LibiX blanket resists these problems better than any other blanket we have tried.'

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Q&A

AT THE JUNE FINAT CONGRESS in Turkey, Jan Frederik Vink handed over the presidency of FINAT to Andrea Vimercati of Pilot Italia. As well as president of FINAT, Jan Frederik is owner of Dutch label converter Kolibri. The last two years have been challenging ones for the pressure-sensitive labels industry, and L&L asked Jan Frederik to reflect on his presidency and how he sees the future for FINAT, Kolibri and the labels industry

L&L What have you most enjoyed about your presidency of FINAT?

JF: Most satisfying was working as part of a fantastic team and receiving great support from the likes of past president David Harrisson and FINAT secretary Jules Lejeune, among many others. I have also to mention the friendship and positive energy from fellow board members. Travelling in and outside Europe, I met, and made, many friends within our industry, including amongst our friends in national and also international associations, such as VSKE, TLMI and many more. It was great to visit new countries like China, Brazil, Mexico and other countries. I did enjoy taking up the challenges which face FINAT and its members in these difficult times.

L&L Looking back on your presidency of FINAT, what would you say are your most important achievements?

JF: This is something I should leave to others to answer! But from my point of view, I was able to render some positive influence in the period 2002 – 2004 as Treasurer. We developed some useful guidelines, based around a simple model, for a more stable financial policy, which we still use today. As president – and also as vice-president – we developed a new, open strategy, which is focussed on stronger relations with our national associations in Europe, but also getting a more international role for our industry. Label printers became more interested in FINAT, and we were able to improve mutual co-operation. In addition, we launched the Label



JAN FREDERIK Vink celebrating 18 years
FINAT co-operation with Labelexpo

label converter Kuresa in Peru. We have learned some important lessons. First and most important, you need to define a strategy. What do you want to achieve from a partnership? Then search for partners in the right customer and geographical areas with complementary machinery or technology. You should check that their PMCs and strategy share your vision on collaboration, then start in an easy and hands-on way. Take time and invest in your partners. Mutual trust and reliability is very important.

L&L What challenges does FINAT face going forward?

JF: FINAT faces the challenges of responding to a number of pressures facing the industry – these include globalization, the importance of the environment and the passing our family-owned businesses onto the next generation.

Firstly, we need to develop a stronger environmental policy and solutions which will meet the needs of our customers and at the same time make our own operations leaner and greener. Finat wants to take a more active role to serve our industry.

Release liner is a key issue, for example, and FINAT has done a lot of work on developing recycling and reuse strategies, but for the future this is not enough. Secondly, in a globalized world where the major customers and suppliers are increasingly operating on a global scale, we must make more initiatives to build an international network for our industry. Finally, we need to give young managers a really good chance to develop and participate in the FINAT organization. This was the motivation behind the launch of the YMC I mentioned earlier.

L&L What will your new role as FINAT 'past president' involve?

JF: The role of the past president is to remain on both the board and executive board for another two years and to support the new president. In addition, an important ongoing project for me is to provide support and coaching for the new

YMC board of FINAT, which was installed at our recent congress in Antalya, Turkey.

L&L How are you finding the current business climate with your own converting company, Kolibri?

JF: Of course things are difficult, but it has also been very good to experience that I have a real 'Kolibri-team' behind me. We are already changing things rapidly within our organization and are working more closely with our partners. We reinforced our sales organization to serve our customers even better. At the moment, we have some success with our competence center, where we develop new labels together with our customers and their designers. The big advantage for our customers is winning valuable time and money and at the end they get the best result possible.

L&L What advice would you give to converters finding things tough in the current recession?

JF: We need to work together more closely, particularly where we serve clients with an international focus. You should look to add value by working together on exclusive activities, for example on joint R&D projects with your converter partners, suppliers and customers. You need to move away from producing simple 'commodity' products sold on price alone.

L&L Outside of work, what are your most passionate leisure interests?

JF: I have many interests and activities, however they are all under pressure at the moment because of lack of time. First come my wife Dionne and three sons and the house and garden. I am chairman of my local hockey club and I play in the veterans 'A' league – which is sometimes the cause of minor accidents! When I can, I like to play a little bit of golf. In the future I plan to travel more frequently with my wife.

Printers Forum, which provides an open platform where label printers from different countries meet to discuss and benchmark common management problems and solutions, and the FINAT Young Managers Club. For me as manager/owner of a private label printing company, the YMC is particularly important in bringing forward the next generation of managers to get them strongly involved in the, mostly, family-owned companies in our industry. They will take over when we retire from the industry - or maybe sooner.

L&L Under your presidency, FINAT has reached out to converters outside Europe – particularly India and Latin America. What advice would you give to converters looking for overseas partners?

JF: We at Kolibri have made a successful partnership over some years with the

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THE VOICE OF THE END USER

HOW TO INNOVATE (part 1)

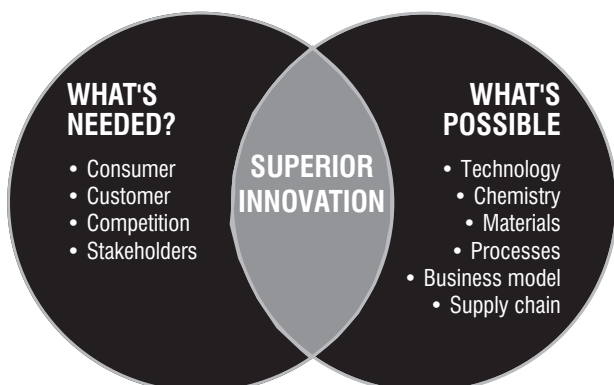
IN the first of a regular series of columns, Paul France, global principal engineer at Procter and Gamble, discusses the innovation process

With the economy in dire straits, I have no doubt that many in the Labels and Labeling industry have implemented survival strategies and cost-savings plans. Lean manufacturing, Just-In-Time (JIT) inventory systems, waste reduction plans, etc... all these initiatives are seeing a renewed interest as a means to cut down costs. But what is being done to increase current, and especially create future revenues?

The current economic situation reminds me of a quote by Charles Dickens (A Tale of Two Cities, 1859): 'It was the best of times, it was the worst of times.' During times like these, we need to remind ourselves that crises are great opportunities to create and drive change. Economic downturns are also good times to work on the long-term projects that tend to get shuffled aside when sales are great. Companies with a long-term perspective are now investing in innovation. So when the recession ends, they will emerge stronger. Innovation is the hot topic for the label End Users as they need to constantly have better, faster, greener and cheaper ways to communicate with the consumer.

Innovation happens at the intersection of 'what is possible' and 'what is needed', as shown in figure 1 below. Today, we will focus on the 'what is possible' side of the innovation equation. In a subsequent publication, we'll address the latest developments in understanding the Needs and Wants. The innovation landscape has drastically changed over the last decade as several industries moved from a centralized and in-house approach to an open innovation model based upon an external network of innovation partners. Several label and labeling companies are putting processes and systems in place to capitalize on this new trend.

FIGURE 1: INNOVATION HAPPENS AT THE INTERSECTION



In the initiation phase of open innovation, companies are mainly focused on technology scouting to fill up their bucket of 'what is possible'. This is a one-way transfer of technology through sharing needs lists with a pool of mainly suppliers.

However, very quickly the low hanging fruits are harvested and companies start to morph several technology providers into true collaborators or partners. In the second phase, companies are building a relationship of co-invention-based interactions with outside resources, as opposed to a transaction-based orientation. More experienced and mature open innovation companies are now entering the co-creation stage. A complex ecosystem of multiple partners is now tackling the more complex needs and their involvement spans the total development pipeline: from front end innovation (ideation) to commercialization (implementation).

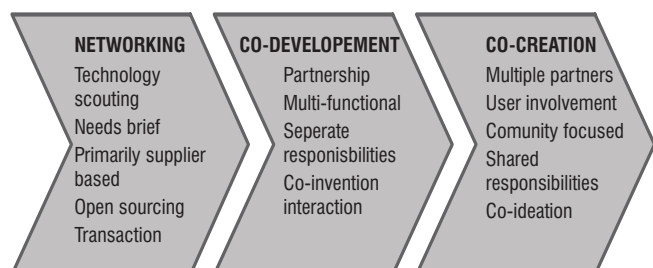
Label and labeling companies cannot forget the need to prepare for the future. Whether the economy recovers in the short or the long term, now is a good time to gain internal support to kick start or accelerate open innovation. Your customer, the end user is after all expecting you to prepare for the post-crisis future now.



ABOUT THE AUTHOR

Paul France has been 17 years with P&G. Since 2006 he has had global responsibility for printing and decoration innovation for all P&G brands. Within P&G, France is also a Technology Entrepreneur: constantly on the outlook for new technologies and new products. This column represents a personal view and not that of Procter & Gamble

FIGURE 2: THREE STAGES OF OPEN INNOVATION



NEWS EXTRA



UV flexo unit in-line on a XeiKon digital press

NSD ADDS IN-LINE UV FLEXPRESS TO XEIKON PRESS

NSD International – formerly Simpson Label Company – has reduced costs and turnaround times on its XeiKon digital label presses, as well as expanding print capability by adding an in-line UV flexo hybrid unit. This creates a range of production possibilities previously undertaken off-line.

Comments NSD boss David Hedley: 'This development, which had not been possible with the XeiKon press until now, will introduce new and valuable cross functionality between digital and conventional printing.'

This development opens a range of new opportunities to the company's clients, including the addition of UV flexo color. For example, reproducing gold or silver as a spot color was never feasible from a digital press. In addition, other metallics and, even more importantly, special varnishes including fluorescents can be added to the existing digital CYMK process.

Other possibilities have emerged from the in-line installation of the UV flexo facility including optically brightened lacquers, which NSD is currently employing for HM Revenue & Customs in the production of covert UV-visible

varnishes for duty stamps on spirits.

David Hedley expects this capability to open up further opportunities in other sectors such as gift products and security products, with more work forecast from the drinks sector.

The in-line facility also introduces a range of features only previously possible in two or three stages. For example, glitter particles can be added to lacquers, while precise registration between digital and flexo assists 'pin-point sharp' design with high gloss and matt lacquers as well. Latest technological advances in anilox rolls will allow sharper and smoother tonework to be printed.

'For NSD's customers, there are very considerable benefits of the condensed process on the company's two XeiKon presses,' says Headley. 'For example, ultra-short runs with multi-variants and special colors at much keener rates are now achievable, while lead times are shortened, wastage reduced and the job is more secure with full print run integrity.'

The development of the combination UV flexo/digital press won NSD an award at the Flexotech awards.

PAGO SIGNS THAI AGREEMENT

Pago International AG and Salee Printing Co. Ltd, a leading producer of self-adhesive labels based in Thailand, have signed an extensive cooperation agreement to jointly supply high quality decorative labels to multinational companies along with the necessary logistic capabilities on a trans-continental basis.

Comments Dirk Lautenschlager, director of Pago's product-decoration international projects business unit, 'Product launches across continents confront the makers of decorative labels with entirely new challenges. Pago and Salee Printing have responded to this demand on the part of multinational customers by entering into close cooperation.'

Both companies already supply multinational companies in their respective regions. 'In future, close cooperation and an intensive exchange of knowhow will be established between the two businesses,' says Lautenschlager. 'Customers will therefore benefit from transcontinental, coordinated customer service with local production facilities and logistic concepts for high quality decorative labels.'

Commented Salee Printing managing director Savate Naratippakorn, 'By uniting our strong position on the Thai market with the highly developed technologies of Pago, the diversity and quality of our products and services will be further enhanced.'

Based in Bangkok, Thailand, Salee Printing is one of the leading manufacturers of self-adhesive labels in Southeast Asia. The company services the hair and body care, pharmaceuticals and chemicals as well as the beverages and food industry sectors. The company was founded in 1996 and employs more than 110 people. It is a subsidiary of the Salee Industry Public Company Limited, which is listed on the Market for Alternative Investments in Thailand.

ANDERSON & VREELAND TO DISTRIBUTE NYLOPRINT

Flint Group Flexographic Products has announced that Anderson & Vreeland is to distribute its line of nyloprint printing plates and processing equipment for letterpress printing applications. Anderson & Vreeland also distributes Flint Group's line of nyloflex printing plates and equipment for flexographic printing applications.



WARNING:

AS NEWS FROM THE GLOBAL ECONOMY WORSENS, regular L&L columnist Bob Cronin, *The Open Approach*, explains how value enhancement can help grow your company in a tough economy

As label producers, you're familiar with the cautionary words that often accompany your brilliantly printed wraps, foils, and pressure sensitive products. In fact, you may have even congratulated your pressmen on the readability of the 4 pt. type. While you likely skimmed such warnings in the past, heeding their advice has now become essential. The difficult economy is bringing about plenty of new issues, but even worse, it's transforming old "truths" into bald-faced lies. These lies threaten the very livelihood of your business, and thus deserve a warning notice of their own.

This column serves as just that notice. It will discuss the top new lies, why they are occurring, and how they affect you. It will also offer guidance for navigating them and protecting your business's best interests. Fortunately (for both of us), it's not printed on the seam of a shrink sleeve.

THE 5 GREATEST LIES OF THE NEW ECONOMY

"I'M YOUR BANKER, AND I'M HERE TO HELP YOU."

Perhaps you've heard the U.S. banking system is being infused with massive amounts of capital. Perhaps you're wondering why none of this is trickling down to you. The reality is that such "bailout" money is NOT being directed to support business growth; it's being used by banks to clean up their balance sheets. Subprime mortgages, unpaid credit card debt, and other bad loans need to be accounted for, and these funds are going toward what the banks can't write down.

Now part-owned by the government—and under heightened scrutiny—banks are very wary about further exposure. They're closely monitoring current investments and cracking down at the first sign of trouble. They're calling notes, seizing assets, and shutting down companies for which they recently extended credit lines. Any request, covenant violation, late payment—or even rumor—is triggering

their ruthlessness. The partner that used to meet you for lunch now will eat you for lunch. In today's economy, your banker is no longer your friend.

Navigating this issue requires fastidious attention. First, do whatever you can to optimize cash flow. Work harder on improving accounts receivable/collections. Renegotiate supplier contracts and incentives. Motivate employees to find cost savings and reduce your breakeven. Trim costs from anywhere you can (now's the time to fire your brother-in-law). Healthy cash flow will not only help you stay afloat, but will improve your credit/financing opportunities.

Second, take time to establish real dialogue with your lenders. Open up the lines of communication. Help them understand your business. Explain seasonality issues and address any of their concerns. Keep your bank in the loop—and on your side.

If you're in prime financial condition, ask to have your credit line expanded. Even if you do not need it, you may, and withstanding lender scrutiny will be much easier when you're doing well.

"IT WILL TURN AROUND NEXT QUARTER"

In the label industry, bad times are often negated by the good months following. The current environment, however, puts a new twist on this belief. The brightest minds do not forecast a turnaround this year, and predictions are still hazy for 2010. When it does return to "normal," who know what "normal" will be! One thing we can agree on is that the climate for financing, deals, and expansion may not ever be the same.

What this means is that you cannot count on business getting rosy next quarter. Sure, it could get better, but be prepared for it getting worse.

in. Label specs are becoming less elaborate, and less expensive substrates are growing in favor.

To address this issue, label providers must deliver a clear "value add." Offer customers solutions before they ask. Examine recurring RFPs that you haven't won, and strategize ways to handle more efficiently. Would a slight adjustment save them significant costs (and fit you better)?

It's not a matter of your customer understanding you, but you understanding your customer. Show them you're in tuned to their business and the economic pressures they face. Keep them close and develop as many contacts within their operation as you can.



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.

Believing Old "Truths" May Be Hazardous to Your Health

Craft plans for what you'll need to do if business drops 10%, 20%, or 30%. Well-formulated strategies planned now will be far superior to those developed under pressure.

On the flip side, ramp up efforts to build sales. Take every means to promote business, strengthen ties with customers and prospects, and keep your company top of mind. If you don't have a formal marketing/customer retention strategy, develop one. Take downtime to visit customers and showcase your latest and greatest. Build, innovate, and command attention. Don't count on business turning around next quarter, turn the next quarter around by what you do.

"OUR CUSTOMERS UNDERSTAND AND WILL SEE US THROUGH"

Customer loyalty is no guarantee for your future. Many industries are facing issues even greater than our own. Recently our firm was engaged to help rescue a print provider whose #1 account had been their most loyal customer for years. The trouble is that account was Circuit City.

Even those not in dire straits are doing what they can to save money. Certainly an easy thing to look at is print. Non-essential print is getting eliminated, and "must-haves" are being examined more closely. Print buyers are losing their jobs, and purchasing departments are stepping

"IT'S AN INDUSTRY ISSUE"

Struggling label providers are not alone, but there are plenty of companies that flourish. Good times and bad, these "profit leaders" sustain a steady course. How are they different from you? Take a close, objective look at your business. Where are you positioned in regard to customers, markets, talent, segments, capabilities, geographies, R&D, etc.? How do you truly stack up to your competitors?

If you're heavily concentrated in declining markets (e.g., retail), now's the time to change your trajectory. If you have the means, could an acquisition accomplish this? If your size/capabilities scope is an issue, is there a logical merger partner? In this economy, changes are coming on fast and furious. Your swiftness in planning, preparing, implementing—and continually refining—your strategic growth plan is imperative.

"KEEPING YOUR ASSETS IN SOMETHING YOU CONTROL CAN'T BE WRONG"

Print is largely a lifestyle business, with many owners' finances locked entirely into their companies. Viewed as an investment under their control, their businesses have served as the "banks" for their lifestyles, second homes

— or even just retirements or family successions.

The faltering economy shines a new light on this adage. For one, many have learned that their businesses are not under their full control. More important, they've learned it's absolutely essential to diversify risk.

Even with the lower property values, now may be the perfect time to sell. Consolidation will continue, and will increasingly challenge your ability to compete. Selling now before your bank requires it is a great solution for diversifying (and preserving) your investments.

"DETERMINING YOUR COURSE OF ACTION"

Many great label companies have already been harmed by the new lies of the troubled economy. Hopefully, by understanding these issues and adopting some of this advice, you can better insulate your company. To those of you going strong, I offer you my congratulations. But amidst the tightening credit markets and economic influences, I'll offer another warning: Tough times may be closer than they appear.



THE VOICE OF THE END USER

HOW TO INNOVATE (part 1)

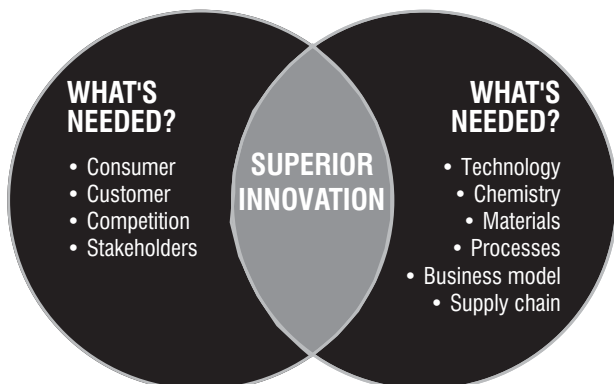
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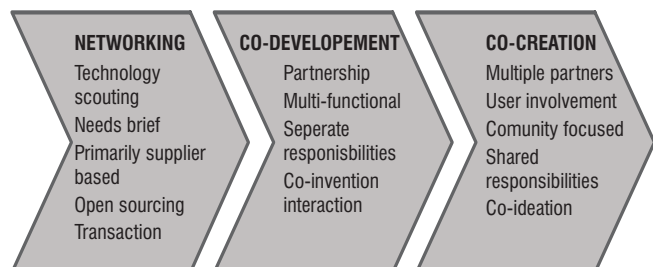
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FIGURE 2: THREE STAGES OF OPEN INNOVATION





On-press approval moves to the web

IMAGINE you could perform a press pass remotely using a standard web browser. Andy Thomas reports on a groundbreaking technology

A new web-based color management systems is claiming to make on-site press approvals a thing of the past. GMF's Final Print Assurance (FPA) employs measured color data for comparative statistical analyses of a contract proof and a press pull in a 'real-time virtual collaboration venue'.

Developed by GMF Flexo Prepress, a leading prepress and color management firm, Final Print Assurance takes virtual collaboration beyond simple proofing, emulating an on-site press approval, plus analyses during the print run from anywhere at any time.

Print buyers, designers, prepress and converters analyse established color standards from the approved proof and the pull - not a PDF of the proof or a monitor calibrated to match the press sheet.

This is claimed to give print buyers complete control of their color management with consistency, repeatability and accountability across global suppliers.

'Final Print Assurance was born out of the frustrations experienced by end users who were not able to monitor their colors consistently without having to spend weeks going to press approvals,' says Greg Platt, president of GMF Flexo Prepress.

'Final Print Assurance offers a virtual

platform from which to measure color consistency throughout a press run and from run to run - 24/7. In an era of travel bans and green initiatives, this technology can save print purchasers hundreds of thousands of dollars, by eliminating travel time and costs, and significantly reduce a company's carbon offsets.'

GMF Flexo Prepress has partnered with Zerofootprint to allow print buyers to calculate the environmental benefits of eliminating an on-site press approval using the Final Print Assurance Calculator at http://zerofootprint.net/one_minute/final_print_assurance. Customized to the printing press and the user's global color standards, Final Print Assurance shows the Color Data of the proof and the press pull, with color difference defined as Color Tolerance values and as a tone curve for comparison against the tolerance standard specified.

Rather than viewing the full footprint of the press pull, critical areas of the job can be selected for color comparative analyses with the proof. Color sample comparison assures that established standards are within specified tolerances, showing the actual readings and indicating if they are "in spec" (green light), "questionable" (amber light) or "unacceptable" (red light).

The user notes appropriate comments

concerning the action to be taken by the printer to correct any unacceptable variances. The proof and press pull are also superimposed for checking such detail as language and spelling, and bar codes for defects and certification requirements. The approved pull can become the color standard for subsequent runs of that job. The contract proof and press pull are scanned by the printer under the same conditions, eliminating reflection, which could contaminate the color data. The monitor used for the comparative analysis is calibrated to represent the press condition, and the proof and pull are viewed together within the same color space.

Final Print Assurance works independently of the printer's workflow system, and is color standard independent, supporting all standards. It supports remote press approvals in all printing environments, including flexo, litho and gravure and measures unlimited colors, including Opaltone (Expanded Gamut) and PMS specials.

FPA is a client/server based system, allowing multiple users to view, collaborate and annotate the contract proof and press pull in the same environment, providing real-time chat between CPC, designer, converter and other collaborators. Print histories can be archived.



MARC BOEHLEN, CEO of Bopack

European converting group with a global reputation

MIKE FAIRLEY visits the Bopack Group headquarters in Belgium and talks to CEO Marc Boehlen about the company's success and performance in today's economic climate

Look for the top label converters and label award winners in Europe and it's almost certain that the name of Bopack will be amongst the final list of contenders. Specializing in the development and production of self-adhesive labels since the late 1960s, the Bopack family-owned business has built an enviable reputation in product labeling that today spans a total of six converting plants across Belgium, France and the Netherlands and which has reached an annual turnover in excess of 90 million euros. Quite some achievement.

One of major European players in the production of pharmaceutical, cosmetics, food and beverage, and chemical labels, Bopack's state-of-the-art production equipment (almost 80 letterpress, flexo, screen and digital offset presses), the latest pre-press hardware and software, computer-to-plate technology and other in-house tools ensures that customers' receive the highest print quality and production flexibility.

The company has also been at the forefront of many of the latest technology innovations and product solutions with investment in recent years in digital offset presses (now five in total), in cold foil printing, in security labels, promotional and booklet labels, as well sleeve labels – all targeted at meeting the demanding standards of brand owners and their partners.

'Indeed', says Marc Boehlen, the company CEO, 'Bopack was the first label converter to produce digitally printed labels for the pharmaceutical sector using a fully-integrated, 100 percent camera control system, and with the process validated with key world-renowned pharmaceutical customers. We have also developed a range of special brand protection, authentication and security solutions for our pharmaceutical customers which include holograms, laser engraving, anti-counterfeit, incremental numbering, hanger labels, protective sleeves and multilayer labels.

'All Bopack manufacturing plants are ISO 9000/2000

LABELS&LABELING

accredited. Rigid application of safety procedures and total control of the label production process, essential in our three specialized pharmaceutical manufacturing plants, are standard and the company guarantees 100 percent traceability – from the labelstock right through to the finished product.'

Similar dedication exists in the three Bopack plants producing cosmetics labels, each with cosmetics experts on hand to guarantee a stylish and faultless label and product presentation. Labels are supplied in different languages, versions and sizes, with guarantees on delivery schedules, and combine a number of different printing processes on any one label design.

While quality, performance and service are key to Bopack's success in the pharmaceutical and cosmetics sectors, it is production flexibility and reactivity that is important in the production sites that also produce food and beverage labels and shrink sleeves. Various pack-specific functions may also need to be built into the labels to provide customers with re-closeability, freezability, long shelf life, etc, while unique highly-effective solutions developed for the cosmetics sector find a ready application in the high-end food and beverage sectors.

For the production of industrial and chemical labels, Bopack has developed labels to meet the toughest of specifications for chemical, thermal and mechanical resistance, with more than 400 hundred different adhesive types, special inks, re-sealable solutions, Braille images, washable labels and much more. These are produced for world-renowned companies in the oils, lubricants, greases, paints, chemicals, maintenance and cleaning products sectors. Customized solutions to meet specific customer or end-usage requirements are also available while logistics labels, partially pre-printed and perfectly imprintable, are also part of Bopack's range,

It is undoubtedly the company's dedication to quality,



MARC BOEHLLEN with his son Frederic, operations manager, Bopack Belgium

performance and service that has kept them in a good position during the current economic climate. 'Although we saw volumes fall a little towards the latter end of 2008,' adds Marc Boehlen, 'they have certainly been running above last year for the first few months of 2009. That's quite encouraging. Having said that, the value of sales is a little down on last year, but that's probably only to be expected at this time. However, by standardizing across our various plants we have been able to gain significant efficiencies.

'Although we produce locally, we have developed a global reputation in our specialist markets and have a pretty loyal customer base. The locally-based plants continue to do well because they are specialized, produce on a just-in-time basis and are extremely flexible in the way they operate and provide a service to customers. Each sector is different in the way they order. Pharma is very different to food; that's why we have to specialize.

'Even though the world is facing economic and market pressures, label companies still need to be investing. Customers expect it. That's why Bopack has continued to invest in, for example, the latest HP Indigo digital printing equipment, in products and technology that will enhance our efficiency and performance; in press add-ons that will add value.

'We have additionally, for example, been streamlining the workflow of all six facilities in the group through the introduction of Cerm MIS software. Two production plants in France have already implemented the software and we will be deploying Cerm at the other European sites at a rate of two companies a year. This will give us total standardization across the group, regardless of the company size.

'We have also been closely following developments in RFID labels, especially in relation to our pharma business – although this market now seems to be moving in favor of matrix codes rather than RFID for item level tracking. But again, we are well placed to capitalize on whatever the pharma sector requires.

'Most recently, sleeve labels have become the latest offering in the group's product range: a technology which offers customers many decorative and functional advantages. It means we now possess a unique and flexible advantage in this specialist market: different versions of a single package can be supplied, in low volumes, within two to three weeks.

'The matt or shiny sleeve surface provides a razor-sharp and true reproduction of a still image with a superior image resolution and because the sleeve completely surrounds the product, its entire surface area can be printed with photos and/or text and the whole pack is scratch-free, thanks to printing the logo, etc, on the inside of the sleeve. Complex shapes can also be sleeved. 'Besides the decorative aspect, sleeves are a functional type of packaging. Perforations – horizontal or vertical – can be applied to primary packages so as to ensure an all-round, tamper-proof seal to the product. Alternatively, a sleeve can act as a secondary type of packaging

BOPACK INTRODUCES LABELS WITH LASER-SENSITIVE INKS

Demand for razor-sharp and true reproduction of a still image exists in all sectors, but nowhere is it more important than the pharmaceutical industry. To cater to market demand, Bopack has expanded its product offering to include labels coated with laser-sensitive inks and lacquers.

Bopack applies a thin film of laser-sensitive ink containing the patented DataLase pigment onto paper or plastic media. This layer is then machined by a laser beam. After exposure to laser light, the DataLase pigment changes color and the desired information appears.

This makes the displaying of variable information simple. Barcodes, data matrices, batch numbers or expiry dates: this information needs to be printed quickly and reliably onto the product. The electronic 'watchdog' circuit transmits signals in order to immediately remove, from the production line, any packages that were erroneously printed.

In addition, 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, says the company.

'To ensure the best possible result, the quality of the labels is thoroughly tested before shipping out product to the customers. This is because every customer has his own unique requirement and expectations about the product, which we need to focus on,' said Grete Devooght, label adviser at Bopack.

For example, 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.

Thanks to this printing process, Bopack can produce labels in an efficient, environmentally responsible and eco-friendly way. Because the printing is no longer done using consumables, such as printer ribbons, there's less waste: which is good news for the environment and less raw materials are needed per print run. The use of laser-sensitive inks also means less downtime compared to other printing methods.

which groups together different product types, like you get in duo packs.

'When we put sleeves together with our other label products it means that within the Bopack group we can now provide a total solution for every conceivable challenge in the field of product identification. That's a tremendous advantage to customers.'

So where does Marc Boehlen see the future of the business? 'In the key sectors that we produce labels for – pharmaceuticals, cosmetics and industrial – the market is becoming ever more global. This undoubtedly means we have to move into new regions such as Eastern Europe and other markets. That's something of a challenge for a family-owned business to finance and resource.

'Certainly, it's no great secret that we have been looking over the past few years at the possibility of a merger or acquisition with another key player to further grow the business, but it takes time to find the optimum partner if this is to work well for all those involved. However, I'm sure we will make the right decisions in the end.'

As this article was being written, negotiations were proceeding for Bopack's acquisition by Groupe Autajon, a French-based converter of folding boxes, presentation boxes and labels. This has now been confirmed (see p.12).

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The rise of shrink sleeves

NEW OPPORTUNITIES for shorter runs of more highly decorated shrink sleeve labels are opening up for narrow and medium web converters, says global consultant Sia Memarnia

WHY SHRINK SLEEVES?

It is often said that shrink sleeves are a fashion, a fad or a bubble that will soon burst. It is also wrongly assumed that shrink sleeves require wide web printing presses (600mm +) for cost effective production. In this article we will examine the fallacies surrounding these two statements.

The use and applications of shrink sleeves have continued to accelerate in recent decades. There are many reasons for the continued growth which will be detailed but three separate and distinct events have been instrumental in introducing massive new applications for the product:

- The widespread introduction of vending machines during 1970s in Japan and the introduction of light weight 330ml glass bottles for carbonated beverages resulted in the need for OPS (Orientated Polystyrene) shrink sleeves to provide glass retention properties in the event of glass breakages. This led to a massive increase in the use of shrink sleeves for carbonated beverages in Japan.
- The Tylenol poisoning tragedy in 1982 in the Chicago area where some capsules were laced with Potassium Cyanide led to an urgent need for the introduction of tamper evident packaging. Similar copycat incidents in Europe, fortunately with no fatalities, also raised the very important issue of tamper evidence to offer a degree of protection and reassurance to consumers. Shrink sleeves proved to be a visible and effective solution and one that could be implemented rapidly.
- The introduction of the first ever full length sleeving of narrow neck beer glass bottles, Snake Bite, in the UK in 1995 by Sia Memarnia, resulted in a massive potential new market where the surface quality or color of the container were no longer of importance as the sleeve would cover the total visible container surface. The emphasis was switched from the container to the sleeves. A complete mind change.

The combination of the above three events can be singled out as the key impetus behind the wide spread use and acceptance of shrink sleeves on a global basis. However, there have of course been many other innovative ideas; new shrink films, new printing techniques and printing finishes and also applications in addition to the use of efficient application machinery and steam tunnels which have all made significant contributions to the continued growth.

Shrink sleeves are no longer confined to use on premium products but they are often wrongly compared with other

forms of labeling in terms of cost. A direct price comparison between shrink sleeves and most other forms of labeling will conclude that shrink sleeves are more expensive! But such simplistic cost comparisons are misleading and under-estimate the full potential of shrink sleeves in terms of their ability to take costs out of containers. Cost comparisons are only meaningful if everything else is the same. The following points would explain why:

The significant growth of shrink sleeves is not due to their ability to offer 360 degree labeling; a paper label on a can of baked beans produces the same result. Of course, the all round decoration capability of shrink sleeves on highly shaped containers gives it one of its important advantages but there are many others to consider too. For instance for non-carbonated beverages, a 500ml PET bottle weight can be reduced from 26-28 grams to 20 grams by the use of high shrink PET shrink sleeves which would act as a powerful corset around the container body while the container is under compression. Given the need to reduce the amount of packaging used for environmental reasons and also significant container cost reductions by using 30-40 percent less resin, the shrink sleeves would effectively cost nothing! In addition, shrink sleeves can eliminate the need for colored PET containers or PET containers with UV barrier properties, both of which add costs and present a challenge in terms of recycling.

Another example would be the use of shrink sleeves as an alternative to coated glass bottles. Here again the cost reductions would be significant with no adverse impact on the products' shelf impact. The ability to apply sleeves on the filling line on Flint glass would offer a further cost saving in terms of minimizing storage costs of already coated bottles. Another example where the overall cost savings will exceed the sleeve cost.

HDPE and PP containers used for household products and also toiletries markets offer significant opportunities for maximizing shelf impact and taking costs out. The surface color and quality of the containers are no longer relevant as the shrink sleeve can cover all the visible areas. In some cases, it is also possible to reduce the container wall thickness to take further costs out. Effective and intelligent use of shrink sleeves in all such cases can result in significant overall cost reductions while maximizing shelf impact.

Shrink sleeves can also provide effective UV protection for light sensitive products in addition to a wide range of tactile finishes. The use of pearized, thermochromic inks, high luster metallic inks, matt finishes and product resistant inks etc. have become the norm.



TO show the possibilities of short run shrink sleeves Sleever International has developed the MySleeve system, which makes it possible to create made-to-measure, customized sleeves on the spot in just 20 seconds.

None of the above shrink sleeve benefits can be fully utilized in the absence of efficient application machinery and consistent shrink results. Loss of line efficiency due to poor quality shrink sleeves and/or inefficient application machinery would more than out-weigh any possible cost savings offered by shrink sleeves. In addition, this is a product that has to shrink and the introduction of a new generation of steam tunnels for use on both empty and filled containers has resulted in excellent shrink results on a consistent basis. With today's modern steam tunnel technology, the use of hot air or infra-red tunnels is effectively dead.

NARROW AND MEDIUM WEB PRINTING

Shrink sleeves started life with wide web gravure printing which by definition resulted in creating a massive market in the volume end of the business requiring high speed application machines. While it was possible to produce small runs on wide web presses, the unit cost was too high and only suitable to limited premium products. Also, efficient low speed application machines did not exist and it did not make commercial sense

LABELS&LABELING

'The dividing line between success and failure with shrink sleeves is a narrow one and we can see the results in supermarkets'

to purchase high speed application machines for low speed requirements (Buying a Ferrari and doing 30 miles/hour for school runs!).

In short, the supply side of shrink sleeves defined the market. With today's advances in narrow and medium web printing technology, significant improvements in UV flexo technology and UV inks and also efficient lower speed and inexpensive application machinery and steam tunnels, it is possible to develop and create new market opportunities using small run narrow/medium web printing.

There are also important trends to minimize stocks, significant trends towards more frequent design changes and the need to minimize origination costs and to reduce lead-times to two weeks or less. Short-run narrow/medium web printing offers significant and distinct benefits which cannot be fulfilled as cost effectively with the traditional printing presses used for shrink sleeves. Narrow/medium web printing capabilities for shrink sleeves will open up new exciting opportunities which are not cost effective with wide web printing at the present time.

Success with shrink sleeves is much more demanding than with many other forms of labeling due to the complex technical requirements of the product. It would be a mistake to think that to enter the market is simply a matter of printing on a shrink film substrate and turning it into a continuous tube! There are many companies who have entered this market and would vouch for the accuracy of this statement and can back it up by the credit notes they have had to produce as well as excessive, and continued, waste factors.

In order to succeed in this field a holistic approach has to be taken. That is, a thorough understanding of the critical inter-dependence of film and print technology, world-class manufacturing techniques to ensure consistent product integrity and to minimize waste and costs, in addition to an understanding of application machinery and steam tunnel technology combined with meaningful and effective project development work. The dividing line between success and failure with shrink sleeves is a narrow one and we can see the results in supermarkets.

The total value of shrink sleeves used outside Japan is still below that country's 1 billion euros per annum. Given the increasing awareness of many national, multi-national and global companies of the benefits of shrink sleeves, as well as advances in film, application and steam tunnel technology leading to applications and opportunities which were technically impossible a decade ago, the potential market for shrink sleeves outside Japan remains immense. What we see today is merely the tip of the iceberg.

ABOUT THE AUTHOR

Sia Memarnia has more than 20 years experience in the shrink sleeve sector and is the author of 'Shrink Sleeves: The First Comprehensive Technical Guide 2009', available from www.labelsandlabeling.com/shop

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AUTO. LABEL PRINTING PRESS

Digital Summit shows new possibilities

WITH completely new business models emerging for digital printing, Barry Hunt reports from the Digital Label Summit in Barcelona on a technology finally taking its place in the mainstream

As a mainstream process, digital label printing is now identified with clearly defined markets. Not all of the applications have been fully exploited, but the technology has at least encouraged converters to adopt a more service-based approach to label production. Its share of production processes is climbing too: annual sales of digital presses is around 14 per cent, but this share is expected to reach 20 per cent within the next five years. These themes were debated in depth at the first Digital Label Summit held in Barcelona in late March. In fact, the two-day event attracted a creditable total of 274 delegates from all over Europe and beyond.

In his joint keynote presentation, Alon Bar-Shany, vice president and general manager of HP Indigo, placed the key digital markets and applications in the context of global economic trends. Stressing that 'digital was not a dream, but a reality', he said printing was not about volume but about value. Based on HP's estimates, digital printing accounted for only 2 per cent of the total printed surface in 2007, but its share of total print value was 16 per cent.

An increased run-length crossover point, new digital opportunities, a deconstruction or reconstruction of the value chain, and environmental considerations (such as print only what you need, when you need it, where you need it) were key factors. After 15 years of customer-driven growth, breakthroughs in productivity using end-to-end solutions were changing the economics of printing. In 2008 the annual output of Indigo presses was equivalent to a surface area of 10 billion A4 pages. Page growth by application placed labels with a 36 per cent increase, with 56 per cent for packaging.

Bar-Shany said digital label printing allowed brand owners to move goods faster with reduced inventories and therefore optimize their supply chains. It helped to reduce overall costs while maintaining design differentiations, and customer-driven innovations in terms of label changes, variations and market testing. 'Don't think about cost per label, but instead consider profit per job. The overall value should be higher than the printed cost,' he said. Developing partnerships with brand owners was vital. 'They now take digital printing seriously. It aids their marketing ambitions, provides unique anti-counterfeiting and product authentication solutions, while reducing inventories. For them it is a "greener" process.' As for future growth, he concluded that digital label printing output would reach an estimated equivalent of 100 billion pages by 2016.

Mike Fairley, director of strategic development for the Labels Group, explained the evolution of digital printing and its continuing growth in the second keynote presentation. Between 170 and 200 narrow web digital label presses are installed each year, with HP Indigo accounting for most of them. By the end of 2008 almost 1,000 narrow web digital presses had been installed. In output terms, between 2003 and 2008 around 12 billion labels were printed digitally. Around 90 per cent of digital full-color labels were printed

on self-adhesive materials. Almost 80 per cent of all digital label presses installed to-date have off-line finishing facilities, with conventional die cutting and varnishing as the two main processes. The top five applications are: food, health and beauty/cosmetics, wines, spirits and other beverages, pharmaceutical, and household products.

Some 65 per cent of full-color digital jobs are in run lengths of under 10,000 labels, while 95 per cent are under 50,000 labels. By comparison, 57 per cent of conventional label jobs have run lengths of under 25,000 labels, while 71 per cent of jobs are under 50,000 labels. He added that over 52 per cent of North American label printers and 47 per cent of European printers say they already use some form of digital printing. Opportunities for future growth and investment would be especially strong in India and Latin America.

Digital printing had moved the industry from being production-led towards being a service-based industry. While meeting the continuous demand for short-run prime labels, it offered increased flexibility and new business opportunities. Summing up, he said the latest models from HP Indigo and Xeikon can match the speed and performance of conventional label presses, while UV-equipped digital inkjet presses were becoming more sophisticated and faster: 'A planned and targeted digital investment can provide converters with a more successful and profitable, future.'

WHAT BUYERS WANT

'Our criteria are better, cheaper, faster and greener with less wastage. Ideally, suppliers should have scale across the globe and their technology should apply to multiple label and packaging substrates.' Presenting the brand owner's view, Paul France, global principal engineer for Proctor & Gamble, said his company worked globally with around 500 label and packaging printers. While noting that consumers may be unaware of printing differentiations, as a buyer he would like to see more customization: 'Printers should ask themselves what they can customize or personalize for the benefits of consumers and major retail chains.'

Pau Dueñas, managing partner with Morillas, a Spanish design agency, agreed: 'I would certainly like to offer my clients more digitized personalization, although it is a major challenge to extend this to all the labels and packaging in individual projects.' He added that achieving worldwide color standards was a problem. France said the smaller digital world offered an easier route to reach this standardization, but the analog world was also improving because of its globally-minded ink makers and substrate suppliers.

Responding to a question, France said wider web widths, longer print run capabilities, faster press speeds, and more speciality inks could overcome some limiting factors. He likened the digital world to peeling an onion. Dealing with printers, ink makers and others made partnerships desirable



for all concerned, but he personally found the printing industry tended to be closed to outside innovations. PG was therefore developing partnership schemes to encourage creative contributions from its packaging partners.

Moderator Mike Fairley added that in his opinion most marketing concepts were way ahead of what the label printing industry can offer. For example, the industry has been talking about effective personalization for the past ten years, but few firms practise it effectively. 'There is clearly a mismatch between designers, brand owners and printers. So where does the problem lie?', he asked. France conceded that the situation had improved, with many more printers talking to influential executives, rather than just purchasing managers. He personally welcomed a higher level of debate since it often led to the testing of new ideas about what could drive sales.

MARKETING BENEFITS

In the session on targeting markets, three managing directors gave their views. Terro-Matti Kinanen of Auraprint in Finland said a mix of inkjet printing and conventional technology increased the company's competitiveness for small runs and helped promote creative ideas for customers. The future lay with labels on demand, but digital printing could help end-users move beyond the usual thermal printing methods. Giving them a better product and enabling shorter inventories added up to a more valued service, while also backed by conventional printing.

Leon Witbooi from SA Litho in South Africa said digital printing showed no differentiation on quality. It had given the company greatly increased growth, while still allowing a 30 per cent increase in capacity on conventional presses. 'Wine labels represent a good niche market for digital printing. Because it helped customers keep low stockholdings they saw it as a valued service. More generally, printers have to become more innovative to make the most of the process'. He added that SA Litho gave special training to sales staff, who operated in a dedicated division.

John Roberds said his firm, Odyssey, installed its first digital press in 1996 and was an all-digital US label converter. The technology allowed even small companies many business

opportunities to exploit, which in his case included wide-format packaging products using a Scitex Vicom 2001. Like other speakers, he stressed the importance of using digital printing to help a customer's marketing efforts, which tended to over-ride cost-per-unit considerations. This approach did, however, require a good working knowledge of substrate capabilities.

As covered in the panel discussion, the speakers again reiterated the importance of targeting brand managers and chief buyers, backed by a dedicated team. As for their own wish lists, the panel agreed the need for even higher levels of productivity, helped by faster speeds and wider webs serving fully-integrated converting devices. Some finishing processes still present challenges, especially when printing cartons. Digital die cutting was debated as one possibility.

The arrival of web-based digital services was an interesting source of debate at the Summit. Barry Griffiths, managing director of Borble in North Wales, described how his firm processes digital job quotes from a newly-designed website. His firm began a trade label printing service in May 2005, basing job prices on templates offering thousands of CMYK designs. Since then turnover has reached around £1 million. Recently Borble became the first UK user of Xeikon's latest 3300 high performance press running with in-line and off-line finishing facilities. Orders include the usual production parameters down to preferred roll winding methods. After accepting the pricing and delivery terms, some customers pay directly by credit card. 'Essentially we are offering a service in which digital printing can help customers change their approach to label design as part of a marketing process.'

FINISHING SOLUTIONS

In-line or off-line finishing? Stéphane Rateau, general manager of SMAG, said many converters favored off-line methods because of greater operational flexibility, especially when involving shift working. On-line finishing offered the merit of producing a finished job with everything included. On this point, Joel Oakes, senior design engineer with Delta Industrial Services, added that knowing exactly what you have printed could be an advantage. It required, however, a good knowledge of a substrate's characteristics since they





ABOVE Borble presentation; **ABOVE RIGHT** A packed conference hall heard the keynote address from Alon Bar-Shany, vice president and general manager of HP Indigo

determined operating speeds. Keith Montgomery, a business development manager with A B Graphics, said the greater use of off-line working reflected the increased complexity of digital printing and wider range of finishing processes, which as in-line processes meant slower press speeds. While die cutting, varnishing and overlaminating were the essential processes, Montgomery said many converters were adding processes more suited to higher value goods, such as security holograms to protect brands in the pharmaceutical and cosmetics sectors. Whether on-line or off-line, it was generally agreed that digital printing and finishing processes offered users more opportunities than those available to most conventional printers.

Geert De Proost, a software director at EskoArtwork, described pre-press strategies for setting up integrated digital workflows using in-house facilities. The included the Kaleidoscope program for automating color conversion in obtaining brand colors, while Visualizer prepared 3D mock-ups of label designs. Echoing an earlier point, he said most converters installed digital presses for short-run production to the exclusion of the opportunities offered by personalization and variable data printing. The answer here was a workflow with data fields for text, images and barcodes driven by Adobe Illustrator. Describing the company's PacVantage software for improving color control beyond pre-press, De Proost said it was developed with ExxonMobil and extended when Avery Dennison joined the team. By removing the color proofing function on HP Indigo presses, it delivers guaranteed printing results with little or no adjustment using specially-developed film substrates.

CONVERTERS' OPTIONS

Mark Hanley, president of IT Strategies, described recent developments in UV-cured continuous inkjet printing. At least ten major vendors offer single-pass full-color systems, some with speeds up to around 1 linear meter/second. Well over 200 systems could be installed by 2012: 'We will be hearing a lot more about inkjet in the future. The traditional office inkjet market is very mature, so vendors are showing more interest in the industrial, non-document markets. In fact a lot of vested interests are pushing it'.

Michael Atkins, national sales manager of Primera Technology, said single-pass inkjet developments had prompted his company to shift from thermal technology in manufacturing small inkjet printers for on-demand labels. The same models also provided an entry-level device for label converters.

Jon Pritchard, a Xaar product manager, explained that while crucial to the development of inkjet technology, OEM printheads were just one of several important components. For

example, advances in ink chemistry had resulted in improved viscosity and pigment levels. They had helped to establish industrial inkjet printing and widen the choice of applications, as typified by the new types of metallic inks capable of printing electronic circuits and raised tactile images.

Combining inkjet printing with conventional processes in a single press line is not new. The latest attempt comes from Nilpeter, with its Caslon UV-cured inkjet module using Xaar's latest 1001 series printheads. Jakob Landberg, sales and marketing director, said users can integrate Caslon within a flexo or offset combination press, or run it as a web-fed off-line unit. 'It offers all the conventional in-line finishing applications, which are controlled by a single operator. As such, we do not consider ourselves as a digital manufacturer. We believe each printing technology has its own advantages and disadvantages, backed by a general move to reduce costs and set-up times.'

Giving a converter's viewpoint, Iban Cid, managing director of Gemark, said his family-run business had installed Spain's first digital press in 2001. It now operates eleven presses with different processes, including a seven-color HP ws4050. 'We combine digital and conventional printing methods to help us remain competitive and innovative.' The company operates a separate digital division, employing a largely young team of digitally-trained operators and sales people. 'Digital printing represents a different printing culture. Quality is uppermost, but we do not sell it cheaply. The accent is on delivering a better standard of service for orders'.

Again stressing the service-led aspects, Isidore Leiser, president of Stratus Packaging in France, said digital printing had provided the company with several business opportunities. The pre-press manager ran the digital division, supported by a separate sales team. Combining both technologies had actually led to the generation of more conventional business.

Managing a combined operation can involve some complex pre-press and management planning decisions. Katy Nightingale, business development manager for LabelTraxx UK, explained the role of management information systems. MIS was already supporting several networked operations involving HP Indigo and Xeikon presses. Jan De Roeck, director of solutions management for EskoArtwork, described the functions of using simplified pre-press files for working with a chosen technology: 'In this respect digital is not very different from conventional working.' Digital workflows offered many opportunities to drive down costs, with a reduced risk of introducing operational mistakes. Digital color management, however, required a different approach to that for conventional printing, where ink colors were more immediately apparent.

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TOP left: Alon Bar-Shany HP Indigo; **BOTTOM left:** Examining digital security options, (l-R) Christian Menegon, HP's international business development manager; Filip Weymans, Xeikon business development manager; Ken Stack, general manager, EFI Jetrión

WEB-BASED BUSINESSES

A duo of American presidents captured the audience's attention by describing how they used web-based digital printing services to beat the recession. Jay Dollries of Innovative Labeling Solutions said his company had augmented conventional methods with HP Indigo's latest WE6000 printer. 'The solutions we offer mid-to high tier customers add up to being more than just a label printer. We have proved that digital printing is not just for short runs.' The brand owner was seen as the prime contact before any buyers: 'We show that what we can offer customers is more important than just majoring on the unit price of labels'.

Untroubled by any previous printing experience, Steve Smith said he formed Lightning Labels in 2002 as the USA's first digital-only label print shop. It currently runs two WS4500s and three ABG Digicom finishing lines. Last year the firm had 3,200 different customers. All business comes via the internet; no sales reps are employed or automated telephone systems used. Customer service reps look after national and overseas customers. 'Our website recognizes that most businesses do not know about digital printing, so sharing the knowledge about substrates and other complexities is very important.' He agreed that emphasizing the service element was more important than unit costs. Educating the customer about what the firm could offer was therefore a critical factor.

In the debate that followed, Dollries said market changes offered digital press users a chance to take advantage of smaller print runs. Digital printing allowed converters to 'do all the hard things' and therefore allowed them to form new core businesses, rather than being just

another process. Smith added that digital technology also met a need for more versioning of labels, giving greater differentiation of simpler labels with faster turnarounds.

In a session on standards and process control, Donald Lewis, a business development manager for Erhardt + Leimer, explained how networked workflow solutions involving pre-press functions, print inspection and post-press inspection applied to digital printing. They were essential for production advances, customer satisfaction and bottom-line savings.

A case study at X-Label showed how it implemented a 100 per cent fully networked inspection system as part of a dedicated quality control system. Defining acceptable production and reducing waste were key factors. Realising this involved verifying PDF files at the pre-press and set-up stages, grabbing screen images before printing, importing PDF information directly from artwork, and using a comparison process on the firm's Nycam inspection system.

INKJET NICHES

A four-man panel had the task of making sense of the latest inkjet technology. John Corral, managing director of Industrial Inkjet (Konica Minolta), described the importance of a substrate's surface energy in respect of rub resistance. UV curing gave few problems, but it was important to match output with the substrate, especially with films. Jules Farkas, EMEA director – VIP Color, said modern inkjet technology reflected changes within a service industry context. Increasingly it formed part of the end-user environment. Ken Stack, general manager, EFI Jetrión, agreed that in-house usage was important in meeting on-demand needs. While most end-users are not interested in the converting business, this aspect represented an unknown quantity of labels. 'In-house users pose both a



ABOVE LEFT: Mike Fairley, director of strategic development for the Labels Group;

ABOVE MIDDLE: Inkjet experts (L-R): Jules Farkas, EMEA director – VIP Color; John Corrall, managing director of Industrial Inkjet (Konica Minolta); Peter Addington, business development manager for Xennia; Ken Stack, general manager, EFI Jetrion

ABOVE RIGHT (l-r) Pau Dueñas, managing partner with Morillas, a Spanish design agency, Paul France, global principal engineer for Proctor & Gamble



inkjet users must rely on spot colors and hexachrome types. New types of metallic inks are apparently being developed, but while conductive types are fairly easy to produce, decorative metallics are proving harder.

The panel agreed that variable data printing and small-run work were inkjet's niche markets, Item-level labeling in supply chains, as practised in China, was another possibility. As a non-impact digital technology, new ideas were coming along as typified by UV-cured spot varnishing and Braille printing, as well as printing on special materials. It was also generally recognized that inkjet was reaching an interesting stage in its development.

PROTECTING BRANDS DIGITALLY

The concluding session explored digital technology's role in brand protection and security printing. As moderator, Fairley

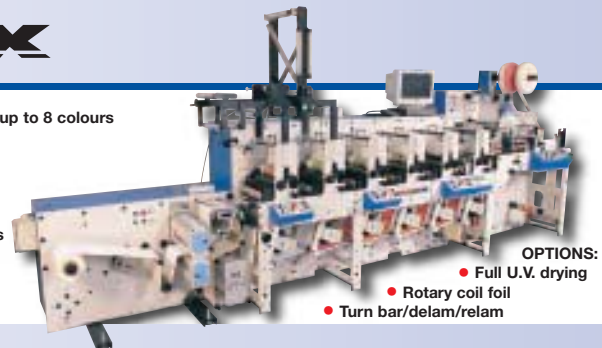
threat and an opportunity for those printers who can handle this shift'. Peter Addington, business development manager for Xennia, added that end-users were producing more print-and-apply labels, which helped them reduce wastage.

In a discussion on inkjet inks, he said Xennia developed its own, but users can specify approved types. Farkas said the industry's future lay in developing mainstream inks, rather than relying on specialist inks, and selling it down ink to prosper. He added that color matching will appear in the future, but for now



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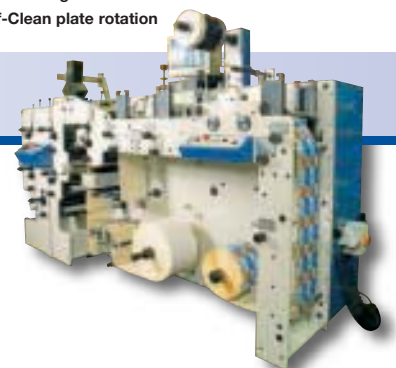
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outlined the huge scale of global counterfeiting involving entire products of varying value, as well their packaging and labeling. Products required authenticating in order to enhance brand security using anti-counterfeiting solutions. 'Whenever possible make each label or package unique. This approach especially favored digital printing. The answers could include security substrates, inks, varnishes and coatings. Other printing and converting techniques included sequential codes and numbering, holographic technologies, plus mass serialization and surface feature authentication. Some of these levels of brand protection were relatively low cost and often not possible with conventional technologies. Collectively, they could be visually mapped to form 'a grid of possibilities'.

Ken Stack, representing inkjet on this panel, said security measures could include modified RFID track and trace tags. Variable data printing, using date-coded fluorescent

inks, offered either overt or covert security measures. Multi-layered solutions were possible, although they required affordable and practical reading technology. Encrypted data matrix 2D bar codes offered another possibility. Filip Weymans, a Xeikon business development manager, described how digitally printed textile labels helped protect garment brands, and with a higher quality than screen printing. Xeikon's toner-based imaging system allowed the inclusion of taggants and UV-based additives. Printers could also add fluorescents at the off-line varnishing stage.

Christian Menegon, HP's international business development manager, said security techniques existed at varying levels of competency and were not always practical. Using data for batch tracing was one way of protecting brands, but users had to be clear about where they wanted to go. As service providers, printers needed to work with brand owners, using security elements that interacted with the packaging component. Selective monitoring of security measures also meant knowing at what level did they involve the consumer - while excluding possible counterfeiters - but effective checking processes must be in place.

Fairley pointed out that anti-counterfeiting methods, such as covert codes, could be used randomly to track batches (or label reels). 'As an industry we are not looking at brand protection. We are leaving it to a few specialists. Converters could therefore do more for their customers; after all, their printed products still need an ink and substrate. Many of these techniques are feasible with digital printing, which offers more than just prime labels. In fact, in summary, we can readily appreciate that digital printing represents lots of new markets, both in a technical sense and as a means of creating new business models.'

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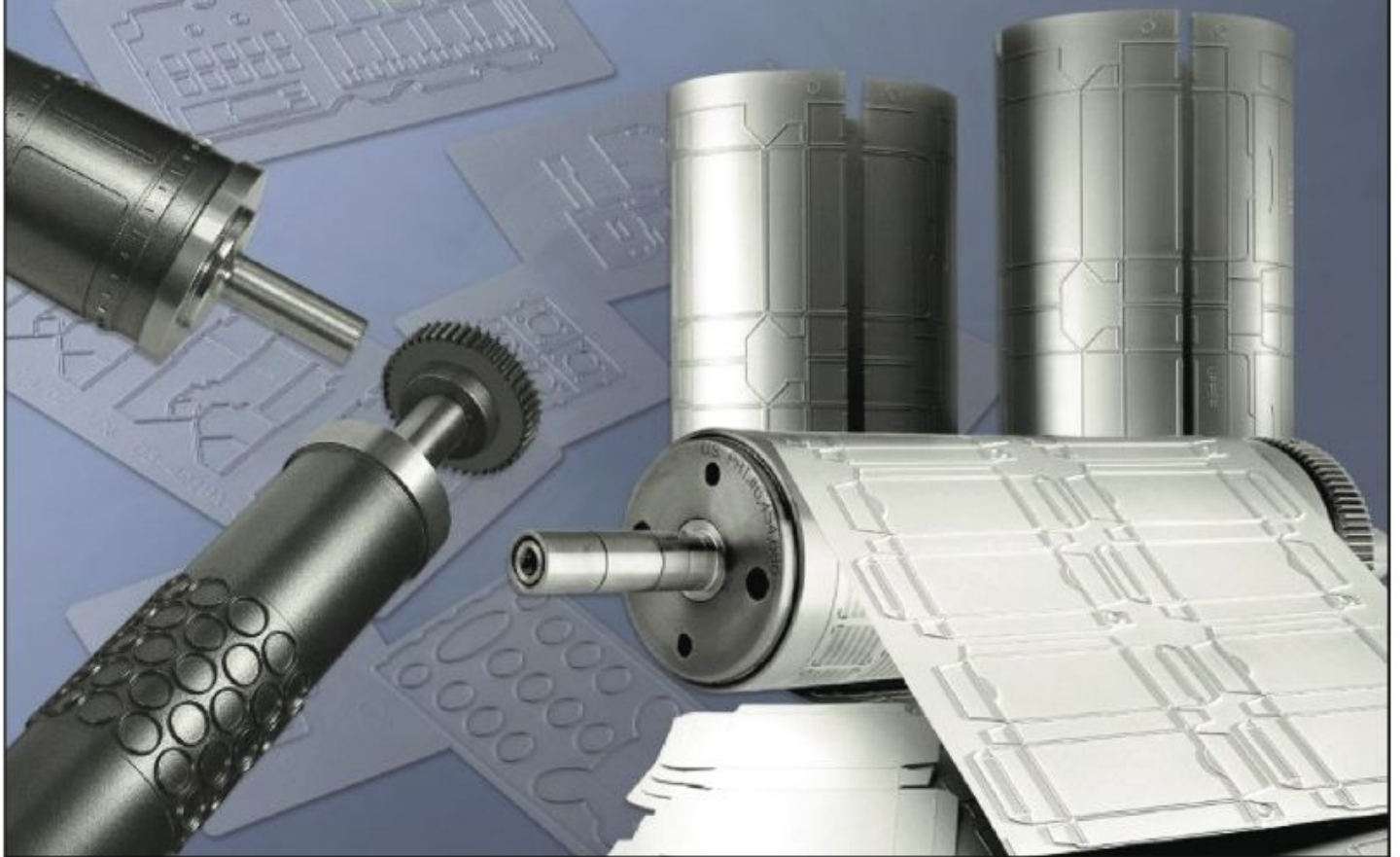
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Product, not process

END USERS are increasingly more interested in the price and performance of the final product than the process by which it was printed, argues Marc Verbiest of EFI

There was a time not so long ago when it was possible to identify the printing technology used by printing companies purely from their company name. The technology not only framed the company, but defined it. Websites and company brochures both had sections headed 'plant list', presumably to impress and attract customers like mating plumage does in the animal world.

As in the animal world, environmental changes trigger evolution of the participants. Changes in the print world are nothing new; the introduction of lithography to a letterpress world, the arrival of final-film output in a hand-planned world, the advent of direct-to-plate and direct-to-press, have all been agents of change. Throughout these changes there have been winners and losers. We have seen the demise of planning houses and scanning houses as printers vertically integrated these activities into their daily routine, but in essence the printer remained true to his core printing technology.

The changes in technology were not happening in a vacuum. The buying habits and patterns of customers were changing. In recent years the market for printed materials has re-stratified according to the application for which the material is used, rather than the process by which it has been manufactured. Indeed, we have now reached a point where the customer no longer cares how the product is produced, but is pre-occupied by price and performance. Many companies have been quick to recognize this new culture, and

have changed their company names to remove all reference to screen, litho, flexo, gravure, or any other print technology. This un-freezing of the print technology climate has enabled converters to embrace and employ additional technologies in order to better service the market segment they seek to serve. It is no longer a market where printers lay out their stalls to attract passing custom, but one where customers specify their needs, and printers compete to satisfy those needs at the best combination of price and service.

"We have now reached a point where the customer no longer cares how the product is produced, but is pre-occupied by price and performance. Many companies have been quick to recognize this new culture, and have changed their company names to remove all reference to print technology"

The emergence of new (digital) printing technologies have enabled printing companies to assemble combinations of print and finishing technology that both complement and contrast their existing processes, and afford an ability to cater for a much wider range of work than could be profitably addressed with a single technology solution. This has been particularly evident in the ability to offer print products at economic

order quantities that have hitherto not been possible. Hybrid combinations of technology within one company are no longer the exception, but have become the norm. The infinite number of variations in combination of technologies and equipment now allow printers to differentiate their offering against competitors. Where previously they all shared a common print technology and could only compete on efficiency and retained profit margin, service and price are now the predominant drivers.

One spin-off of this explosion in print technology combinations is an ability to produce print jobs which hitherto have been rejected on logistical or economic grounds. There is clearly a pent-up demand for short-run printing at acceptable pricing that has been frustrated by the lack of technology that can deliver. The merest hint that new technologies can deliver customer benefits, whether real or generated, has fuelled the rush to invest in the latest offerings. Likewise, designers and specifiers have been quick to recognize the potential offered by the change in the supply market, and are now designing and specifying jobs that take advantage of the new market capability.

Which came first, the demand or the capability? It doesn't matter. What is important is that it has happened, and there is no going back.

The commercial, promotional and transactional print markets have been early adopters of the digital technologies, often because the finishing solutions have been interchangeable between the existing analogue print and the



NILPETER Caslon conventional/digital hybrid press

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HP Indigo WS6000

newer digital output. Indeed, much of the early digital input was variable data and barcoding bolted onto existing presses or finishing equipment.

The labeling market has been an enthusiastic user of this technology to add value to what has been a market dominated by long production runs, and even longer turn-round times, but the Holy Grail of economically priced short runs is only now being addressed. This market for short-run is fuelled by a demand for versioning, breaking existing long runs into a number of versions in order to cover geographic, language or other variations, or merely to reduce the size of stockholding of finished labels as a hedge against unforeseen changes in the label design, or the cost of stockholding. The ultimate in short-runs is full variable data where each label is different, essentially a print-run of one. Agreed: the market for such labels is limited, but it is one where the prices make the total value very interesting, if not profitable.

The roadblocks to success and uptake have occurred in both the printing and finishing solutions. Digital print solutions that offered digital output in a format different from the traditional narrow web have required additional investment in large digital finishing solutions. The costs of large-format dies and the (relatively) long set-up times for finishing have negated many of the time and cost gains achieved by digital printing. Durability of the digital print has also been inadequate for many applications, often requiring laminating or coating before becoming fit for purpose. This, coupled with the need for specialist substrate or pre-coating, has limited digital to all but the shortest of run lengths on cost grounds alone.

The introduction of laser cutting has removed the fixed costs of finishing (dies), but the capital investment and

running costs have impacted on the final label price. It is also fair to say that laser cutting is not suitable for all applications or materials.

In recent years a number of true narrow web digital presses have emerged, designed and engineered specifically for the label market as opposed to evolving from the transitional and other print markets. Their use of UV-cured inks offers image durability that competes with UV-cured flexo, screen and litho inks, and allows them to print on many of the substrates used in label printing today, without the need for pre-treatment of the printing surface. Their format makes them compatible with that of existing finishing equipment, and can be fed to both flat-bed and semi-rotary re-registering die cutters as well as to laser cutters. Some manufacturers even offer the option of print-to-register which offers the facility of digital printing in register with pre-print produced by conventional analogue methods, or to digitally print in register with pre-die cut material produced

on simple finishing equipment, thus removing the cost involved in purchasing new finishing equipment. This feature can further be utilized in the production of double-sided window labels where front-to-back registration is essential.

Most, if not all, vendors of digital print solutions will claim that their system will produce short runs more economically than analogue systems, and would accept that the obverse is true for longer runs. The difficulty for any printer with access to both technologies is to determine the economic break-even point between the two systems, all other things being equal (quality, durability, etc).

Analogue label printing systems benefit from low variable running costs per label (ink) and high web speeds (80m/min+), but suffer from long make-ready times where the press is idle, and the relatively high fixed costs of plates per job. Most press operators will admit that they only print for 40 percent of their shift, a situation that gets worse as print runs get shorter and the number of make-readies increases. The costs in waste material generated during make-ready must also be factored in, especially as their significance increases as print runs get shorter.

Digital web solutions benefit from almost no set-up cost in terms of time and plates, but use a more expensive ink resulting in an almost linear cost-per-label curve. They generate significantly less waste as there is no make-ready, and can be programmed to print exact quantities without the



AGFA Dotrix inkjet press



Digital vendors are coming to market from three directions: traditional press manufacturers, such as Nilpeter, looking to sell the next generation; digital vendors such as HP Indigo, Dotrix and Xeikon, breaking out of the traditional market for their products; and companies such as EFI Jetrion, Sun Chemical and Epson, which have developed new machines specifically for the web label market

color management system to feed the press, dedicated digital inks (or toners), and appropriate finishing solutions. Some vendors offer a turn-key solution providing all elements from within a single company, whilst others employ a mix-and-match approach.

What becomes clear is that there is no one best solution. Each label printer must look deep into the present and future needs of his existing customers, or of those he wishes to service in the future. Thus informed, there is a combination of print and finishing technology out there that can satisfy the customer whilst still returning a good operating profit, even in these hard times. It is not an easy process to select the best combination, nor is it an exact science, but doing nothing is not an option either. What is certain is that the market for labels has changed, is changing, and will continue to change at an ever-increasing rate. Label printing companies will need to adapt and evolve if they are to survive, let alone to be successful. The dinosaurs taught us that much.

To comment on this article, go to www.labelsandlabeling.com/blog

ubiquitous 'overs'. Their print speed at 25-30m/min is respectable, especially when it is sustained over many jobs with almost no down-time between each.

Most salesmen from digital vendors will happily draw you a graph on the back of an envelope describing the break-even point, below which it is a no-brainer to go digital. Putting a numerical value on that point is a little more complicated, but many companies now offer cost-of-ownership tools that help the process, as well as there being some specialist software companies that have recognized and addressed the market need for such assistance. These tools also help going

"It is not an easy process to select the best combination, nor is it an exact science, but doing nothing is not an opt either"

forward as a valuable aid in quoting for both analogue and digitally printed jobs, and as an internal management tool.

In the midst of this polarization, analogue or digital, have emerged a couple of presses that attempt to utilize the best of both, but are in danger of falling between the two. Mounting a digital head on a conventional web press would, on the face of it, appear to be a good hybrid, taking a proven transport system and applying the economics of short-run that digital can offer. The danger is that, rather than taking the best of both, you combine the worst of both. In this sense the speed of the web when printing is limited by the digital heads, generally printing slower than the transport was designed for when printing analogue. Likewise the system still has the make-ready times and waste of analogue, thus further reducing the

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effective print speed and output. This solution does, however, offer a low risk route to digital without jumping in with both feet.

Digital vendors are thus coming to market from three directions; traditional press manufacturers, such as Nilpeter, which have seen their market mature and are looking to sell the next generation, digital vendors such as HP Indigo, Dotrix and Xeikon, which are breaking out of the traditional market for their products, and companies such as EFI Jetrion, Sun Chemical and Epson, which have developed new machines specifically for the web label market.

Behind all of these technologies, one should remember that a digital system comprises more than just a press. There is the need for an effective workflow and



EFI Jetrion 4000

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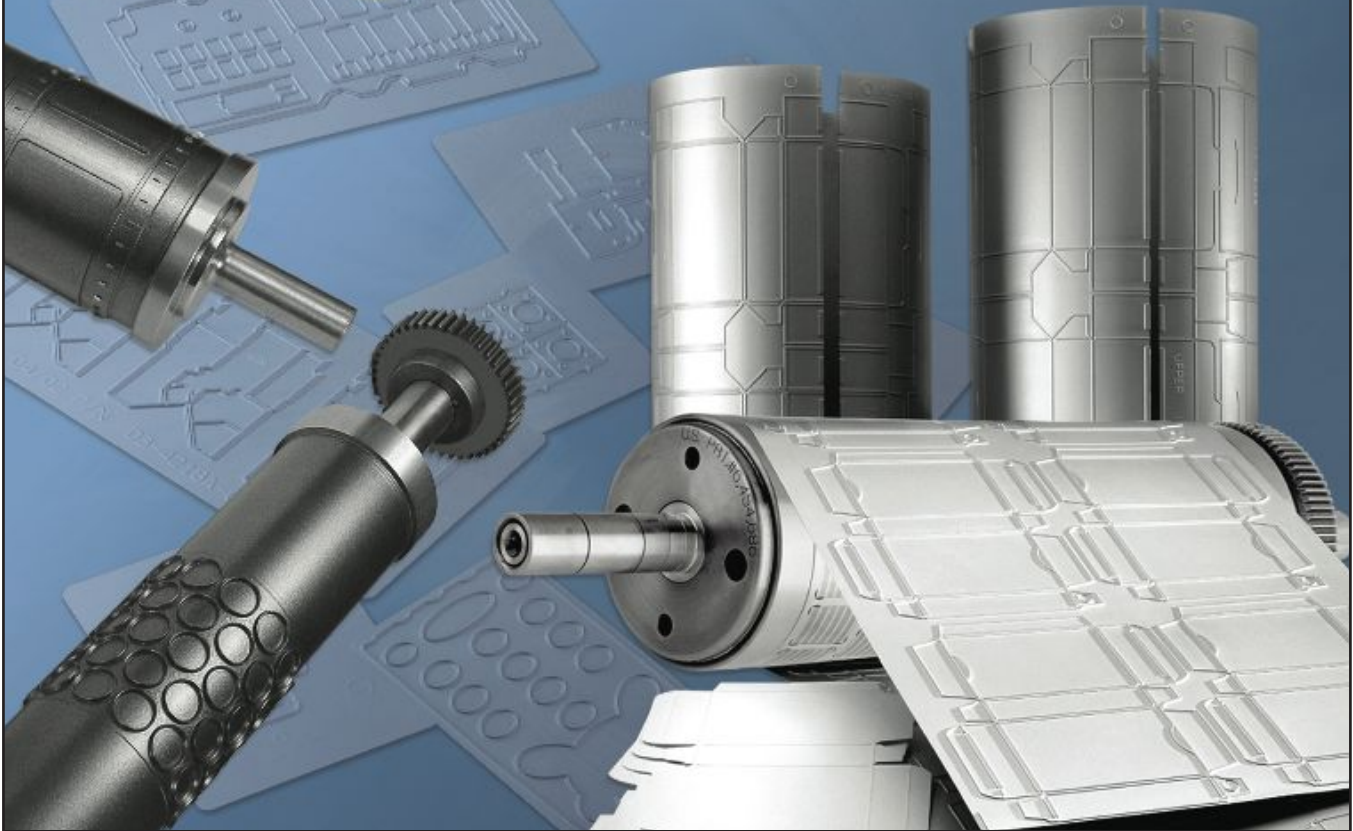
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EFI'S open house at its facility in Ratingen, Germany, attracted converters from all over Europe

EFI hosts German open house

A number of inkjet printers and units have been launched in the last two years, but EFI's Jetrion 4000 is making a strong bid to establish itself as a genuine alternative to HP Indigo and Xeikon in the digital label sector. James Quirk reports from the company's recent German open house

Digital printing has now established itself in the label industry alongside the sector's traditional processes. But investment in the technology had, until recently, brought comparatively few options.

The flurry of inkjet printer and unit launches at Labelexpo Europe 2007, however, signaled the beginning, if not yet the arrival, of a new range of options for converters seeking to target short run, variable data applications. Eighteen months on, it is EFI's Jetrion 4000, whose prototype was launched in Chicago the year before, which seems best placed to establish itself as a genuine alternative to HP Indigo and Xeikon in the digital label sector.

A recent open house at the company's Ratingen, Germany, facility, held in conjunction with new distributor Chromos (see boxout), provided an opportunity to gauge the machine's progress since it became commercially available at drupa last year.

Its evolution has been rapid. Dozens of machines have been installed in Europe, Asia, North and South America – across a wide range of companies and applications. The technology itself has also progressed: with new print heads, updated software, a pre-die cut label printing functionality, variable data printing enhancements and a new ink set all added to the Jetrion 4000 since its launch.

'It has been a real melting pot of companies that have invested in the Jetrion 4000; large and small,' says Dean Haertel, director

"One customer is even producing wine labels. It's a machine with multiple applications: no one is finding jobs that they can't print with the Jetrion 4000"

of worldwide sales. 'Our existing customers are using it in a wide range of industries too: automotive, pharmaceutical, nutraceutical, consumer goods and industrial sectors. One customer is even producing wine labels. It's a machine with multiple applications: no one is finding jobs that they can't print with the Jetrion 4000.'

Haertel says that the 4000 offers converters a cheaper way of taking advantage of market trends towards shorter runs and personalization. As well as its success in the US and Europe, a great deal of interest has been received from the developing markets of Asia and Latin America, with machines already installed in China, Korea, Mexico and Venezuela.

'Latin America is booming for us at the moment,' he confirms. 'The region's converters are quite cost-conscious, and the Jetrion 4000 offers great cost reductions with its lack of plates, for example. It is also easier to bring in UV inks – which are widely used in the region – without using solvents.' At a recent trade show in Guadalajara, Mexico, EFI's distributor TSG sold a machine off the show floor.

Haertel sees the 4000 initially establishing itself as a complementary product, but believes that trends towards shorter runs and personalization will create an increasingly important role for the technology. It continues to evolve, too, with a wider version said to be a potential future development. 'It is a new technology, but we have enough installations to give it credibility,' he says. 'It will always have a fit, because it is an affordable printer that has already proved its capability. And it will get wider and faster, so the Jetrion 4000 can have a key, mainstream role.' Haertel draws comparisons to computer-to-plate technology – 'initially a niche product, but now mainstream'.

TECHNOLOGY

EFI's Paul Cripps provided open house attendees with an overview of the EFI stable of products, ranging from various families of digital inkjet systems – Vutek, Rastek and Jetrion –





DEAN HAERTEL, director of worldwide sales for Jetrion, with the 4000 inkjet printer



JASON Oliver, Jetrion sales for Europe, Africa and the Middle East



CHROMOS APPOINTED JETRION 4000 DISTRIBUTOR

The open house in Ratingen served to introduce Chromos as a distributor for EFI's Jetrion 4000 printer in German-speaking countries. 'My customers look at digital presses to make short-run color affordable and enable the versioning that their customers require,' said Chromos' director of sales, Klaus Sedlmayr. 'To help them find the solution that lets them grow their business, our specialists went through an extensive worldwide review of color inkjet products and visited the manufacturers' facilities. EFI and the Jetrion 4000 came out on top so we knew it had to be the printer of choice for us and our customers.'

'Following our first installations in Europe, a distributor agreement with Chromos GmbH as the premiere supplier of equipment and consumables in Germany is the next logical step for EFI,' said EFI's European director of Jetrion sales, Jason Oliver. 'I am pleased that they selected the Jetrion 4000 and confident that our co-operation will enable us to reach, help and support even more customers.'

"Despite the economic climate, we are launching more products and software this year than ever before"

to controllers and advanced software. EFI operates in a variety of markets, but Cripps reaffirmed that 'Jetrion's niche right now is certainly in packaging and narrow web label printing'. He also highlighted the company's continued growth and investment in R&D: 'Despite the economic climate, we are launching more products and software this year than ever before,' he said. 'It is essential to continue to invest and grow.'

Jason Oliver, Jetrion sales for Europe, Africa and the Middle East, then gave a background to the 4000 and outlined its technical specifications. With speeds of up to 30.5 meters (100 ft) /min at more than 1,000 dpi with grayscale technology, the Jetrion 4000 delivers full-color label

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and variable data printing up to 13.9cm (5.5in) wide. The system also features Jetrion's advanced UV4000 ink set which provides durability and eliminates the need for costly over-laminates. The 4000 is integrated with EFI's Fiery XF RIP and XFlow software. Powered by Best Color technology, this combination provides a PDF-based workflow, top-notch ICC color management, support for different input file types and the ability to generate CMYK expanded gamut outputs.

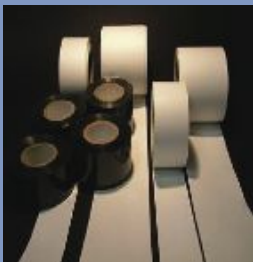
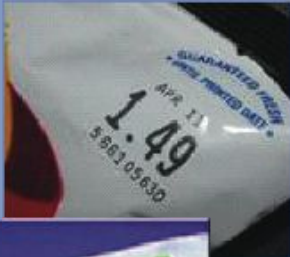
Oliver also highlighted the cost savings of the Jetrion 4000, citing lower capital investment, consumable and operating costs. 'You don't need to put your best operator on this press,' he told delegates.

The 4000 can be placed within a printing line in the factory. One customer, reports Dean Haertel, removed a flexo press and put the 4000 in its place, creating a line with laser die-cutting machines which could all be operated by one person. Alternatively, finishing equipment can be attached to the end of the machine.

Equipped with a web cleaning system

from Teknek and single lamp curing from Dr Honle, the 4000 also has spaced reserved for an inspection system to be installed if required. But despite the pre-drilled holes for camera and screen, Haertel reports that no customer has yet requested it.

'It's not like flexo, where you're mixing ink and pressing the web,' he said. 'It's digital, so the color has more consistency.' A job changeover during Haertel's demonstration of the machine took less than 15 seconds.



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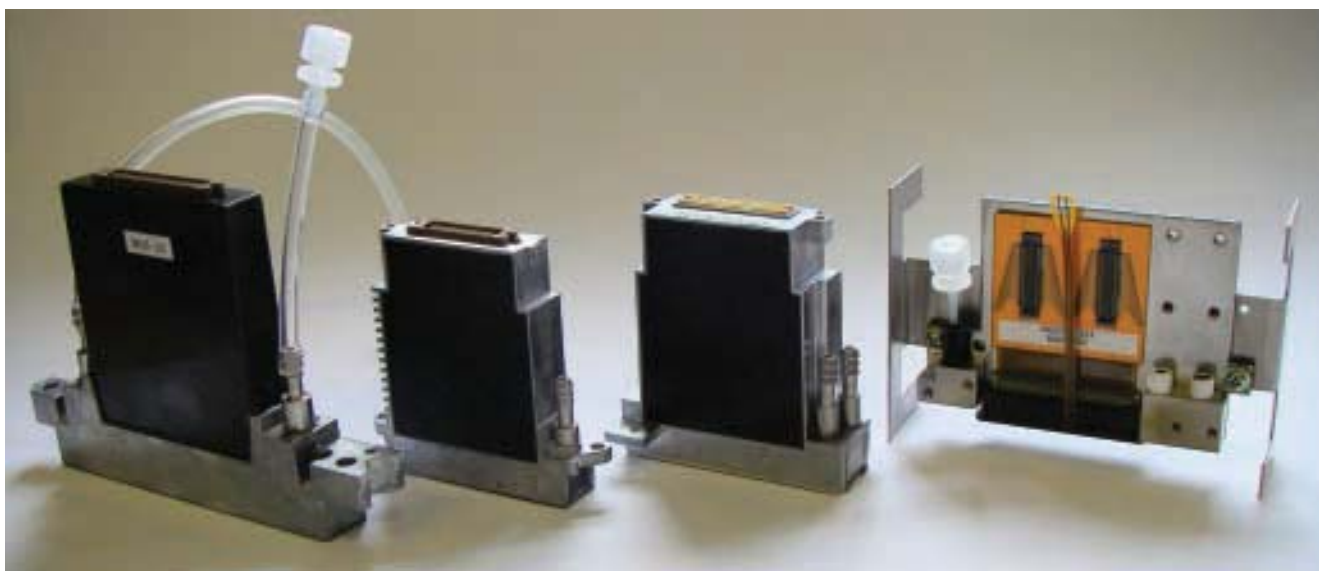
In today's economic climate, there are still plenty of ways for label printers/converters to grow their business – but only for those who are learning from their past experiences, while preparing for the many new opportunities that are already presenting themselves.

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Modular solutions

AS WELL as supplying printheads to the likes of Heidelberg and Atlantic Zeiser, Konica Minolta is selling machine builders complete one-pass print modules to incorporate into their converting systems. Andy Thomas reports

Visitors to the last two Labelexpo shows in Chicago and Brussels will have noticed the presence for the first time of Japan-based printhead supplier Konica Minolta, previously best known for supplying heads into wide format sign and graphics systems.

The drive for the company to enter the narrow web sector came from John Corral, managing director of Industrial Inkjet Ltd (IJ), the sales and technical support arm for Konica Minolta inkjet technologies outside of Asia.

'Although the majority of our printhead sales were into the wide format printer market, we had started talking to machine builders in Europe and USA who were looking at the possibility of using inkjet either for "printing" products like labels or business forms, or printing directly onto CDs, mobile phones or white goods,' says Corral.

Because none of these companies had any experience with designing inkjet systems, IJ developed a series of generic designs for the head plates, ink supply assemblies and head control software. 'Any new machine builder can buy the parts from us, try them out and then once they understand the details, use the designs within their own machine,' says Corral. 'We have seen this work well – smaller companies with limited resources have been able to develop reliable machines in months instead of years.'

At Labelexpo Europe 2007, Corral met converting machine manufacturers who had radically different requirements. Rather than wanting to build inkjet systems into their machines, they simply wanted an 'off-the-shelf' digital module they could offer as an option to their customers.

After discussions with Konica Minolta management in Japan, Corral resolved to build just such an industrial-strength print engine in time for Drupa. The result was a 108mm wide, one-pass 4-colour module that ran every day at the show, printing samples around one third of the time. 'Just to prove a point, we did no maintenance at all for seven days. Reliability was 100 percent,' recalls Corral.

After Drupa, Corral switched to Konica Minolta's latest, more compact KM1024 (1024 nozzle) printheads, which allow more nozzles to be packed into a smaller space, and in just five weeks had built a 4-colour print engine with a 72mm print width and a maximum dimension along the web of only 96mm. Two of these ran at Labelexpo Chicago, again fault-free, with no down time, according to Corral. These digital modules have

now been added to IJ's standard price list.

The technology is now moving to wider widths. Last January IJ delivered its first 144mm wide printhead. 'Our friends at Konica Minolta are now keen that we develop a 360mm unit for the Asian market,' adds Corral.

At the same time, IJ has continued its push as a supplier of inkjet heads to machine builders. There are Konica Minolta heads, for example, on the Heidelberg Linoprint system, the Hapa Blisterjet as well as Atlantic Zeiser Omega narrow web printers.

R&D

IJ maintains a single pass 4-color UV inkjet test rig at its Cambridge HQ, which mounts eight 144mm 1024 heads.

IJ is fortunate in its Cambridge location among some of the world's most advanced technology companies, allowing it to assemble expertise where required in disciplines as diverse as software development, inspection systems and suppliers of UV ink and lamp systems. 'This means we can research a total solution which will work for the machine builder,' says John Corral.

A key R&D focus is testing new inks and substrates from a wide range of suppliers. IJ has demonstrated that most inks will key to substrates with a surface energy of 44 dyne or above without any additional surface treatment. Below that, pre-treatment or coating will be required.

'The key is to give inks the space to wet out,' explains Corral. 'In other words, we do not try and cure the 3-D dots, but let the

GLOBAL EXPANSION WITH AN EXPERIENCED TEAM

Following the success of its European operation, Industrial Inkjet is now expanding its offices to North America and Russia. The US operation, which opened in early 2008, is run by Ed Garcia, a 20-year industry veteran, and the new Russian office by Sergey Belokurov, formally of SUN Ilc, a wide format supplier.

This expansion is backed by a highly experienced team back in Cambridge. John Corral has 25 years experience in inkjet development, beginning with coding technology specialist Domino - also headquartered in the Cambridge region. Corral's technical team also has an impressive track record, with just four senior employees racking up 58 years inkjet experience between them.



JOHN CORRALL, managing director of Industrial Inkjet Ltd

inks spread on the film. You need to wait the right time before UV cure.'

A thin ink film results in a robust, high gloss, anti-scratch surface. 'On many plastic films, for example, you will not need a varnish to achieve a good gloss.'

Because IJ prints wet-on-wet, intercolor bleed is a potential issue which must be addressed by the correct ink choice. Corrall is particularly impressed with Agfa's new ink 'It decreases inter-color bleed and works well with lower energy substrates.'

IJ is receiving more and more requests to investigate functional coatings as well as 4-color inks. 'Spot-varnishing or application of hard coating is a common goal, and more recently we have a lot of enquiries about using inkjet for the production of electronic circuits or solar panels,' notes Corrall. One of IJ's customers is MGI in France and the US, which launched its JETvarnish digital inkjet coater at Drupa.

Corrall's team has also trialed Eckhardt's jettable metallic silver, so far with mixed results. 'When we tried the ink some months ago the results were not yet very reflective. We hear they now have improved formulations. We expect to be trying them soon.'

Corrall has many RFID samples, most produced with Toyo Liojet conductive ink. Customer feedback has been 'pretty good'. 'With most conductive inks the substrate must be thermally stable since high temperatures are required in order to fix the ink for maximum conductivity. We like the Toyo ink since it needs lower temperatures to achieve good conductivity'

Corrall's team has also successfully tested an opaque white, which has critical implications for printing on clear films without requiring a flexo or UV screen undercoat.

'We have spoken at a number of conferences about the limitations of current UV inks – most of them developed for the wide format market. Now we are starting to see the results of that,' said Corrall. 'This month Toyo will send us three new inks for evaluation – each optimised for a certain application.'

GREYSCALE 'MYTHS'

John Corrall is anxious to dispel what he regards as the 'marketing myths' which have grown up in the inkjet industry around speed and resolution. 'There is a strong marketing push in some quarters towards one particular print resolution and number of grey levels. Some customers arrive absolutely convinced that only this one dpi and number of grey levels is any good. But in our print sample lab we find the optimum for each customer's application. And it is rarely what they have been led to believe elsewhere. The key is to test and find out!'

Corrall says a well designed single-pass print engine should give the customer the ability to select the right mix of resolution and grey levels for each print job. 'In building print engines we are helped a lot in that Konica Minolta heads are available in a range of drop sizes, suitable for print resolutions between 360 – 1440dpi. Then we make sure the software can quickly switch between different resolutions.'

To prove the strength of the software, produced by Cambridge company Global Inkjet systems, at Fespa, Digital IJ showed a ColourPrint 144mm system printing the output from a web-cam onto a narrow web. The system processed the images in real time – including full color profiling. 'The results were hilarious' says Corrall. 'Customers would look at the labels being produced for several seconds before realising it was their face on them. Most people did a comedy double-take. One lady actually screamed!'

HOT OFF THE PRESS

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FASSON LABELSTOCKS ADDED TO XEIKON PREFERRED MEDIA

Xeikon has entered into a preferred media partnership agreement with Avery Dennison, certifying Fasson-brand self-adhesive labelstocks for use on Xeikon reel-to-reel digital label presses.

Initially, 14 Fasson self-adhesive labelstocks certified for use with the new Xeikon 3300 and Xeikon 3000 label presses will be offered. As well as the white paper labelstock Fasson MC Primecoat, with a choice of adhesives to meet different application requirements, the certified Fasson range includes the new low-caliper film stock Fasson PP Light Top Clear; a specialty wine labelstock, Fasson Matt Wine; and Innovia Films' compostable NatureFlex film in a Fasson self-adhesive laminate. 'The quality of the print media contributes significantly to the overall quality of Xeikon imaging. Ever since the launch of our Xeikon range, we have been developing our database of print media to provide our customers with script files for specific print media that will help them get the most out of their Xeikon presses,' explained Filip Weymans, business development manager for Xeikon's Label & Packaging division.

'The certified substrates deliver outstanding print results on Xeikon presses, but equally important is the fact that they are conventional substrates used for the traditional reel-to-reel print processes, like flexo. They are therefore always in stock. Our dry toner-based imaging technology allows the use of such conventional substrates without coating or pre-treatment. Not only is this much more cost-effective, it also facilitates the integration of our digital label presses into traditional production environments.'

TORRASPAPEL INVESTS

Torraspapel has started up a new Atlas Universal LS 2-meter slitter rewinder at its Almazan, Spain, mill to benefit its range of Adestor self-adhesive materials.

The slitter rewinder has been designed to further improve the rewinding of Torraspapel's self-adhesive products, in particular the filmic range through more precise control of rewind reel tension. The Universal LS is a 2-meter wide machine equipped to handle jumbo rolls with a diameter of up to 1.6 meters and up to 5,000 kgs in weight. With running speeds of up to 750 m/min, it can slit and rewind materials from 30 to 350 microns.

All Adestor products are manufactured to ISO 9001 quality standards and ISO 14001 and EMAS environmental management standards. The entire product range is available with PEFC and FSC Chain of Custody forest certifications

DELTA APPOINTS WELDON AS SOUTH ASIA DISTRIBUTORE

Delta Industrial Services, located in central USA, has appointed Weldon Celloplast as its South Asian distributor. Delta is a manufacturer of automated web converting and packaging equipment utilizing servo motors, drives and controls.



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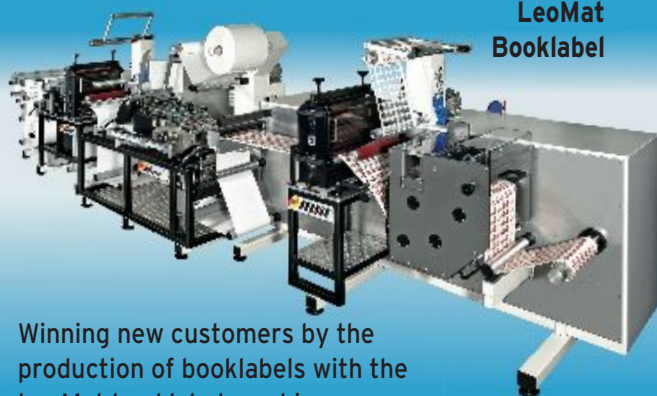
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INNOVATIONS FOR THE PRINTING INDUSTRY

Innovative technologies for the label converter

OVER THE PAST FEW YEARS, Agfa Graphics has been transforming itself from an analog imaging systems provider to an innovative supplier of color inkjet, digital pre-press, software and services. Mike Fairley looks at some of the new solutions available to label converters

There can be few in the label industry who are not aware of the name of Agfa. The Agfa trade mark has been around for well over 100 years and its reputation in the graphic arts sectors for film, pre-press systems, printing plates and, more recently, digital proofing systems, security design and industrial inkjet printing systems is probably second to none.

Part of the 3 billion euro turnover multinational Agfa-Gevaert corporation, the Agfa Graphics division today makes up fifty percent of the corporation's annual sales and is still the world's largest supplier of analog film-to-plate systems. Over the past 10-15 years the company has also acquired Hoechst's printing plate and proofing business, Dupont's offset printing and graphic arts films business, invested in Xaar's inkjet manufacturing plant in Sweden and acquired Dotrix, a Belgian producer of digital color printing systems for industrial applications.

In terms of the label industry a major user of flexo, letterpress, screen and direct-to-press printing technologies

Agfa's aim is to be an integrator for all these printing applications with a range of software, film-plate-proofing consumables, hardware and consulting services. Products include CtP systems and plates, imagesetters and film, workflow automation, screening solutions, proofing solutions and inkjet digital printing.

Although many of these areas are well known to label converters it is in the development of inkjet printing systems and brand protection solutions that Agfa Graphics is perhaps less well known yet they have much to offer the label converter for the future. Just imagine printing in narrow web with a 630mm wide digital inkjet press. That's what Agfa's

Dotrix digital press offers to label and package printers.

With 25 machines already installed worldwide including well-known label converters such as Reynders and Stralfors

the Dotrix has proved it can provide the label industry with a modular solution that uses just the width required for each job (up to 630 mm) and that can print on a variety of substrates which range through heat-sensitive films, pressure-sensitive laminates to in-mold labels.

Even with frequent substrate changes the down-time is limited. Switching from one substrate to another or from a smaller to a larger width requires no preparation of the press at all: the digital inkjet engine uses no elements that require changing ideal when the volumes of shorter-run jobs continue to increase.

Claimed to be the most productive and flexible digital color press for industrial applications on the market today, even for relatively large runs, the Dotrix built around the SPICE printing unit is designed for continuous three-shift operation. Even the ink can be refilled in an external ink supply system during printing to maximize press uptime. Traditional flexo printing stations can also be integrated in-line, or before or after the SPICE printing unit.

A flexo printing station before the unit for example, can serve as a coating/priming pass if printing is required on difficult substrates. Alternatively, a flexo plate can be mounted to give white or spot colors with digital color printing on top. An integrated flexo printing unit after SPICE can be used to lay down a top-finishing lacquer for a high-quality finish. Die-cutting and slitting can also be integrated and, if that is not enough, the unwind and re-wind system of the Dotrix can handle rolls of up to 1250 mm diameter, weighing up to 88 kg, so as to provide for long uninterrupted print runs.

In a very recent initiative, Agfa Graphics has also announced a partnership with Edale to distribute the Dotrix single pass digital inkjet press, a move which enables both companies to focus on the specific needs of mutual customers for digital printing solutions in the flexographic



DOTRIX Digital Press

market. In this particular initiative, Agfa Dotrix have integrated the single-pass inkjet color engine (SPICE) into the Edale base unit, so bringing proven flexo press technology into the digital press room.

Outside of digital inkjet printing, Agfa Graphics has much to offer the label converter looking to work with brand owners to minimize or resolve the problem of counterfeiting. Launched at Drupa last year, Agfa's Apogee Secuseal 2.0 software, Adobe Illustrator password protected plug-ins that fits into standard workflows, that provides a new dedicated security design and verification tool to generate complex security designs and patterns that make counterfeiting recognizable and traceable, so offering advanced protection from piracy and unlawful duplication of designs on packaging, labels and other printed materials.

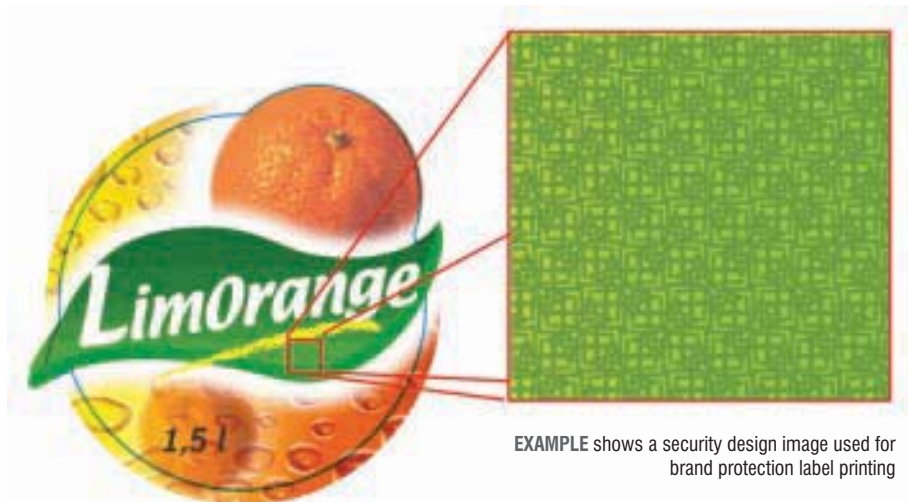
Label industry customers with concerns over packaging and labeling security particularly include makers of luxury goods (such as cosmetics, wines and spirits), pharmaceutical and drug companies, as well as those involved in printing official documents, identity cards and other branded products.

In total, seven modules are available to offer label designers the tools to implement security features into artwork. The software can generate 'Special rasters' from elements within the design that will create tell-tale interference patterns when copied. Path definition can create complex and unique background designs based on mathematical properties that are very difficult to copy accurately. 'Crystal patterns' operate in a similar way, but create difficult to copy patterns, while 'Special reliefs' create finely crafted relief designs with very fine strokes.

Historically, forgers have always tried to copy security designs by means of a color copier. Nowadays however, photocopiers are more and more capable of representing colors that look like the genuine ones; that is unless the genuine document contains inks which are difficult to copy together. In such cases an 'Opposite ink selector tool' helps to select such inks. If a color copier can be adjusted to copy one color correctly, it will have a real tough time to copy the other one!

Also available within the Secuseal software package are a 'Guilloche library' and a 'Line/object generator'. This generator creates latent images or straight line patterns. These images or patterns are then used with a lens as an external verification tool, so making hidden messages visible.

LABELS&LABELING



EXAMPLE shows a security design image used for brand protection label printing



ILLUSTRATION shows how a security image can be incorporated into a label or pack design

Developed from existing Agfa security software used in the banknote, passport, check and ID card sectors, 'Secuseal provides a single, solid solution that works seamlessly with all workflows in which Adobe Illustrator is being used or PDFs created,' explained Agfa Graphics Business Line Manager of security printing, Koen Heyndrickx. 'It is an important product line for Agfa that addresses the security issues facing designers, printers and product managers in today's highly competitive marketplace.' The software works on both Windows and Mac platforms and enables the security level of any individual project to be determined by the designer.

Even with these new advances, Agfa Graphics still see a substantial role for Agfa film in the label sector all complemented with the widest selection of CtP systems. These include Visible Light CtP imaging systems for fast throughput and increased workflow productivity with a 10-year laser lifespan to reduce maintenance and lower the cost of operation; Thermal CtP systems with razor-sharp imaging and fast throughput (in a range of sizes, speeds and automation options); and ThermoFuse Ctp which eliminate or dramatically reduce chemical processing a breakthrough technology which is the most efficient and easy-to-operate system available.

Certainly, the last few years has seen Agfa evolve from an analog imaging product company to an innovative provider of digital imaging and IT solutions and services. This successful transformation has been the result of a clearly defined strategy, combining investments and acquisitions in new growth areas (such as industrial inkjet) with divestitures of non-core activities (such as NDT and Consumer Imaging).

For the future, Agfa will continue to further invest in innovative technologies in inkjet, digital prepress, software and services. The label industry will undoubtedly be one of the key beneficiaries of this innovative growth.

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L-R: Jorge Amalric, production manager, Autopack; Rodrigo Perez, founder and managing partner, Leftech; Miguel Angel Cascone, head of R&D, Autopack

Eco-friendly plate success in Argentina

AUTOPACK, an Argentine label printer, has invested in Cosmolight flexo plate technology from Toyobo, and the Japanese company's Latin American distributor is reporting increasing interest in the water-washable plates' environmental benefits. James Quirk reports

When Argentine label converter Autopack, traditionally a letterpress house, moved into the flexo market with the purchase of an 8-color MPS EF 330, it needed to source new flexo plate-making technology. The converter turned to water-washable Cosmolight plates from Toyobo, through the Japanese company's Latin American distributor Leftech, which not only aided Autopack's transition into flexo, but have also brought significant environmental advantages.

The company was founded in 1990 by Nolberto Fridman and Enrique Szafir, whose experience was in offset printing, and Angel Bonavera, who came from a pre-press background. Beginning with three Ko-Pack letterpress machines, internally reconfigured and updated to suit the company's needs, Autopack established itself as a converter of specialty products, particularly for security and promotional applications, with 90 percent of its output entering its local market.

With the onset of Argentina's economic crisis of 2001, so began the need to export. What had been local innovations now became international successes, with the company's multi-laminates and promotional products aiding the creation of a client base spread across 30 countries. Autopack now exports around 45 percent of its labels.

It was then that Autopack began to look at flexo technology. 'At the time the company was founded, flexo wasn't yet at the right quality,' explains Miguel Angel Cascone, head of the

company's R&D department. 'But as it got better, we wanted to compete. Ko-pack had satisfied our needs up to that point. When we hit capacity, we thought about buying another Ko-Pack machine, but the improvements in flexo tempted us.'

The MPS EF 330, an 8-color servo-driven machine equipped with silkscreen and hot stamping units, was purchased in 2006 – the Dutch press manufacturer's first installation in Latin America. 'MPS offered near-offset quality and the technical support we needed,' says Cascone. 'The press had excellent registration and the quicker set-up was also a big advantage over letterpress. Flexo allowed us to grow in the wine market, for example, where the textured materials can't be printed by letterpress because of the rigidity of the process.'

With the arrival of the MPS press, Autopack began research into flexo plate-making technology. Colleagues at a pre-press company had shown Cascone the results of printing on Cosmolight plates from Toyobo. He invited the Japanese company's Latin American representative, Leftech, to present the products, and was impressed with the speed of plate production and the quality of the plates. The environmental aspect, too, was key: 'It was a big advantage for us that we could offer Autopack solventless products,' recalls Esteban Cambiasso, Leftech's commercial director.

After extensive testing, Autopack adopted the technology and 98 percent of the company's output is now produced

on Toyobo photopolymer plates. According to Jorge Amalric, production manager, the advantages have been numerous – with plates of ‘almost digital quality’ being produced, increased efficiency and environmental benefits.

While solvent polymers can take many hours to be ready, Cosmolight plates are produced in less than one – an increased efficiency which reduces set-up and translates into improved productivity. The plates eliminate the use of environmentally damaging solvents as they are washable in hot water with a little detergent. Filters recirculate the water, meaning less is used, and the process’s complete lack of odor makes for a more pleasant working environment.

With a reproduction capacity of 1 percent at 175 lpi, the plates are compatible with water-based, solvent-based and UV inks. Three different levels of thickness allow use with a variety of substrates.

Amalric reports that while Autopack used to produce a number of digital plates, the arrival of the Cosmolight technology has reduced this need dramatically. ‘Very occasionally, for an extremely complicated job, we use digital plate-making,’ he says.

For Leftech’s Esteban Cambiasso, Toyobo’s Cosmolight plates represent the perfect synthesis between environmental sustainability and increased production efficiency. ‘Lots of people talk about environmental friendliness, but don’t want to pay extra for it,’ he says. ‘However, the increased productivity of the Cosmolight plates translates into increased profitability for the converter. What’s more, you can achieve near-digital plate quality with conventional technology.’

Autopack uses Art-Pro pre-press software and machines from Arpeco and Rotoflex for finishing. The majority of materials used are supplied by Avery Dennison, while inks come from Siegwerk, Flint Group and Radcure.

Fifty-five percent of the company’s production is in promotional labels. A dizzying array of novelties are available, from hidden messages and thermochromic inks to tiny chewing gum labels and a shampoo bottle whose label acts as an exfoliant.

Based in a 5,000 square meter factory on the outskirts of Buenos Aires and employing 100 people, Autopack divides its remaining 45 percent of production between security products, pharmaceuticals, food and wine.



LEFTECH RALLIES AGAINST FALSE ENVIRONMENTAL CLAIMS

Esteban Cambiasso and Rodrigo Perez, the founders of Leftech, are passionate environmental campaigners, and their enthusiasm for the ecological advantages of Toyobo’s water-washable plate systems is plain to see. ‘When we learned of the availability of this technology, it was not only a business opportunity but also a commitment to our convictions,’ says Cambiasso. ‘There is no downside: it is economical, profitable and ecological.’

Since its foundation five years ago, Leftech has actively sought to distribute products that have environmental benefits – differentiating themselves in a region where environmental sustainability is not yet paid the same level of attention as in Europe or the United States. ‘We chose a harder path by offering these types of products,’ says Rodrigo Perez, ‘but one that is much more gratifying.’

In the last three years Leftech has installed over 20 of Toyobo’s water-washable plate systems throughout Latin America – counting some of the region’s leading converters as customers. Sales are ‘rising exponentially’ according to Perez. ‘The companies we are selling to are technologically advanced converters who are investing in the latest presses from the likes of Gallus and MPS,’ says Cambiasso.

Leftech’s most recent addition to its portfolio is UV inks from Japanese company T&K Toka – which boasts a 70 percent market share in its home country.

Cambiasso and Perez are critical of what they see as environmental posturing by other companies in the industry which claim eco-friendly products or processes. ‘The reality is that there are multinational companies which are promoting their products as environmentally sustainable when they aren’t, not from any point of view,’ says Cambiasso. ‘They are using perchloroethylene-butanol in the processing of the polymers – a toxic solvent that has been banned from other industries, such as in washing detergents, where it comes into contact with people.’

‘These companies use what they call ecological solvents, but there is nothing ecological about the processes used to produce them.’



THE MARK ANDY XP5000 installed at Spectrum Label



Spectrum invests for growth

SPECTRUM LABEL in Hayward, California has installed the shaftless Mark Andy XP5000 press – introduced at Labelexpo Americas 2008 – to expand its business. Danielle Jerschefske reports

Spectrum Label Corporation is a 40-year old printer that traces its roots to the pharmaceutical industry at a time when pressure sensitive labeling was just taking off. The company has since developed into an award-winning prime label and packaging converter for the cosmetics, wine, food and beverage and medical industries.

Historically a Mark Andy house, Spectrum has replaced two older first generation computer controlled 16 inch 4200 models with the new servo press. The advanced throughput and increased efficiency that it offers has put the converter in a more competitive position and has advanced its capabilities. Spectrum believes that the new investment will reveal opportunities in broader market segments.

Jerry Kwok, owner, president and CEO, says: 'As the new shaftless servo XP5000 was the first of its kind, its purchase was a cautiously optimistic leap of faith. Based on the capabilities we witnessed during our print trials at Mark Andy, we were convinced the new technology would remove many of the barriers to expanding our market diversity. To date we have not been disappointed.'

The XP5000 is 17 inches wide and fully servo-driven, giving precise register control on thin films. It has nine stations which combine UV and water-based capabilities. Comments Bruce Riddell, VP of technical development at Spectrum: 'The press has a number of characteristics that we were looking for.

LABELS&LABELING

Shaftless servo-controlled registration and correction are critical as is the independent station micro adjustment which makes alterations for plate length variance. The drop-in stations gives us the ability to integrate rotary screen and hot stamp capabilities on the fly so we have faster make-ready times and reduce waste.' The XP5000's output has replaced two older presses.

Spectrum invested in Martin Automatic unwind and rewind units to complement the servo benefits the press offers. 'It just made sense since the XP increased throughput,' says Mark Massey, VP manufacturing. 'With the Martin Automatic machines we have further reduced waste and downtime so we can take on longer runs.'

The improved IR drying units and UV 473W curing systems and online troubleshooting available with the XP5000 systems were additional selling points for what Spectrum intends to do with the machine.

'Thin films that we have not been able to run on our other presses work smooth with this one,' says Massey. 'The servo-managed film tension is fantastic.' Massey says that they are constantly running tests to see how far the machine's capabilities can go. 'The press is a great value. Our staff picked up the technology quickly and we were able to maximize the use of the press shortly after it arrived.'

Some three years ago the company purchased a 10-station 17-inch mechanical Mark Andy LP press that is fully capable of

SUSTAINABILITY

Spectrum is looking into the different certification programs that have been introduced by the TLMI, FFTA and ISO to make the company more environmentally sustainable. But Bruce Riddell is frustrated by this fragmentation: 'The purpose of a standard should be to standardize,' Riddell says. 'If each association or print process develops their own standard, it defeats the purpose of standardization. Imagine what we could do if we just put our efforts together in a consortium and made one standard to fit the worldwide converting industry.'

For the time being the converter prefers to focus more on compliance. 'If you're in the converting business in California, you are already well on your way to being Green,' Riddell says. 'The compliance in the state of California has sustainable attributes to it such as emission abatement programs.'

The converter uses water-based inks whenever possible and has expanded its use of UV inks which release even fewer VOC emissions. And despite inconsistent cooperation from customers, Spectrum is striving to increase the percentage of film liners it recycles.

producing high-end work, including the ability to run rotary screen and hot stamp cassettes. 'Anything can be scheduled onto the LP,' Massey explains. 'Now with the addition of the 17 inch XP5000 we have improved flexibility with scheduling.' Tooling costs are saved because the cylinders are interchangeable.

PHARMA TO PROCESS AWARDS

Spectrum's founder and former owner Alan Leeson made the company into the well-recognized process label printer it is today, setting his sights on the industry's most coveted awards.

Leeson became heavily involved in trade associations in the early '80s, particularly the FTA at a time when the Gardock Corporation on the East coast was regularly winning recognition. To help transform Spectrum into the West coast version of this honored company, Leeson hired Bruce Riddell for his technology expertise and Yates Downes for his graphic skills.

This team worked hard to establish the parameters that yielded consistent, high-quality results. In 1980 Spectrum Label won the first of over 200 awards. 'Spectrum got to be to where it is today and earned its recognition because of Alan's vision to be award winners and because the employees shared this vision, continually helping to raise the bar,' comments Bruce Riddell.

"A key reason for Spectrum's success has been its success in retaining key personnel"

Spectrum successfully adapted the quality control parameters from its pharma business to process labels, and today, while 20 percent of the company's labels business remains in pharmaceuticals, nearly 80 percent is prime label work for various sectors.

A key reason for Spectrum's success has been its success in retaining key personnel. The pressroom foreman, for example, has been with the company for 39 years.

QUALITY ASSURANCE

Spectrum tracks each order from the moment it is placed, documenting the part numbers on each core and regularly verifying a match on all quality control measures. 'Everything is documented,' Riddell says. 'It greatly benefits us and makes our processes more verifiable for our customers.'

The converter uses four Rotoflex inspection rewinders, including one servo model, and four C.E.I. rewinders for inspection and slitting. 'We have a quality system which ensures a consistent method for processing goods,' Riddell explains. 'Our Quality System Manual is continually co-developed by various customer annual audits.'

Pharmaceutical jobs are 200 percent inspected to meet stringent pharmaceutical and GMP requirements. Video inspection systems are also used on-press, including an AVT 100 percent automatic inspection monitoring system. Over the years Spectrum has even compiled a specification and splice book which both illustrates and explains the way each product must be prepared for every customer order. 'We believe that if a process requires that we document a method then we'll write a procedure,' Riddell says. 'It helps to standardize orders according to the customer's requests.'

TWO FTA HALL OF FAME INDUCTEES

Spectrum founder Alan Leeson was inducted to the FTA's Hall of Fame in 2003. Bruce Riddell, Spectrum's VP of technical development, was inducted in 2005.

NEWS IN BRIEF

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ROTOCONTROL SIGNS GLOBAL DISTRIBUTION AGREEMENTS

RotoControl has signed a series of global distribution agreements for its range of inspection, slitting, rewinding and die-cutting finishing machines for the narrow web industry. AP&P Graphic Industrial Services becomes RotoControl's distributor in Finland.

Ari Pyykkö, managing director of AP&P, commented: 'Adding RotoControl to our other top brands like Gallus, Spilker and GEW gives our customers a real choice for finishing machines with the local support and service they expect to back them up.'

PGM Graphics Solutions, which specializes in buying and selling pre-owned Gallus/Arsoma label presses as well as distributing new machinery of other brands like Rotatek and FlexoWash, has been appointed in the United Kingdom. 'Claus Nielsen at PGM has a built a great reputation in the UK, Ireland and Scandinavia with over 20 years experience in the narrow web industry. Our customers there will have the assurance of dealing with someone they know and trust,' said Ralph Beier, RotoControl's international sales manager.

RotoControl has appointed TMT Labels as its French distributor. For more than 30 years, TMT Labels has been a distributor of Gallus group products and services in France, and provides extensive technical pre-sale consultation and post-sale service and support. In South Africa, RotoControl products will be distributed by Rototec, a joint venture between the former Rotoflex South Africa and The Engraving Company (TEC) headed by Michael Aengenvoort and Antron Hendricks.

INNOVIA FILMS COMMISSIONS CELLULOSE LINE

Commercial production has commenced on a new cellulose film manufacturing line at Innovia Films' Wigton site in the UK.

The 10 million euro investment for this new machine was agreed two years ago and will replace two existing production lines which have been in operation since the late 1940s. The project, which was predominantly designed, built and project managed in-house, was completed on time and on budget.

This state-of-the-art equipment will allow the manufacture of some grades faster than currently achieved and will consistently improve quality on others, says the company. Substantial environmental benefits and efficiencies were an integral part of the innovative design and will lower Innovia Films' carbon footprint.

CELEBRATING 30 YEARS OF COMMON HISTORY

In January 1979, FINAT President Leonardo Bucchi sent a telegram congratulating the publishers of a new magazine, Labels & Labeling with the publication of their first issue.

20 years after the foundation of FINAT as the international association for the self-adhesive label industry, the magazine marked a new beginning for our sector. It was the prelude to the establishment of Labelex, the predecessor of the Labelexpo shows. As described in FINAT's history book 'United in Labels', in the decades that followed, the three platforms were instrumental to the dynamic development of the label industry in Europe.

Today, 30 years after the launch of the magazine and having just celebrated FINAT's own 50th anniversary, telegrams have disappeared, and electronic communication has become the norm. What remains however is necessity of effective communication platforms as the lubricants of our sector.

WE LOOK FORWARD TO CELEBRATING OUR COMMON FUTURE!

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 ON PERHAPS OF THEM I WOULD LIKE TO WISH YOU A GROWING SUCCESS AS I BELIEVE THAT IT WOULD PROVE THAT YOU ARE PROVIDING A HIGH LEVEL SPECIALISED INFORMATION SERVICE TO OUR PROFESSION.
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 INTERNATIONAL FEDERATION OF MANUFACTURERS AND CONVERTERS OF PAPER, PLASTIC, METAL AND OTHER BASE MATERIALS.

Chapter 8 Labels

Skanem's Jupiter solves tension issues

A PRATI INSPECTION SYSTEM has increased productivity and quality at Skanem Hobro, reports Andy Thomas



PRATI JUPITER TC400 SLITTER REWINDING INSPECTION MACHINE

In line with its strategic commitment to cost- and waste-reduction policies, international label converting specialist Skanem has invested in a Prati Jupiter TC400 slitter rewinding inspection machine. Installed in its Danish premises at Hobro, the unit offers fully automated tensioning and cutting, improving overall productivity and throughput.

The TC400 has three rewind tension stations, all controlled by the Varycontrol software which keeps the material at the correct, constant tension without stretching. The system supplied to Skanem was tailored to the company's specific needs and features a web width of 430 mm, which is 30 mm wider than the basic machine.

Dan Panduro, production manager for Skanem Hobro, comments: 'We chose to invest in the Jupiter TC400 because in our assessment it was the best in the market for wraps and other special materials. Previously we used to spend too much time cutting this material as our other machines could not coil up with precise tension, and our aim in this purchase was to eliminate that problem. Not only has it done that but it has also improved our operational speed, from the competitors' machines we were using at 35 m/min to the Jupiter's very impressive 312 m/min.'

Job set-up and other operational parameters can be defined quickly and easily, with automated supervision enabled for every working phase. Prati's Varycontrol software provides the

TC400 with its three different rewind tension settings. This also eliminates errors and reduces waste by forcing any active web containing omissions or unwanted elements to the correction table. The magnetic breaking system at the unwind and a dancing roller help to keep the process efficient.

Automation is enhanced with full electronic control of speed, position and torque, via brushless technology. All settings are carried out and stored on computer, with web inspection assisted by special sensors for traditionally difficult materials. A self-sharpening feature prevents unnecessary wear and tear, and rewind accessories include separators, web advance arms and a double revider shaft, all of which are suitable for narrow web applications.

Adds Johnny Tønder of Grafisk Rotationsteknik, Prati sales agent in Denmark: 'Having been involved with Skanem for seven years, I know that the company runs single layer flexible material and needed to improve its output. The final reels are 50 mm wide with a diameter of 520 mm, so the increase in speed by 277 m/min represents a massive gain in productivity. We also assisted in training the company's existing operators on the new equipment and Skanem is very pleased with the results.'

As well as being suitable for use with traditional opaque stocks, an integral ultrasonic alignment device enables working with transparent substrates.



GS1 coding Solution

LAKE IMAGE and Ashe Converting have combined to allow South African farmers to meet Tesco's GS1 labeling specifications, reports Andy Thomas

Lake Image and Ashe Converting have collaborated to successfully deliver an integrated GS1 label printing solution to enable apple farmers in South Africa meet Tesco's strict quality requirements for labeling. GS1 DataBar symbols have recently been specified by Tesco as they carry more information in a smaller space than the current alternatives and are particularly useful for hard-to-mark items like fruit and vegetables.

The solution is in use by Smart Farming, a large supplier of fruit and vegetable labeling to farmers in South Africa. Tesco's requirement for self-adhesive GS1 produce labels created a new challenge for Smart Farming, as the labels now need to be verified to a far higher level to ensure that print quality and information is sufficiently clear for in-store scanners to read them at the point of sale.

'There is a strong emphasis on inspection for this contract and Lake and Ashe have worked hard to integrate the camera systems to ensure "perfect synchronicity",' said Amos Krisi, CEO of Smart Farming.

The system has gone live in April and Lake Image's IntegraVision camera

system has been fitted to a 330m wide Opal slitter rewinder with 17 lines, each 20mm wide printed in a single web run. Any faulty or sub-standard labels are identified by IntegraVision which triggers a controlled stop in the run so that the label from the appropriate line and lane can be removed from the backing paper and discarded.

"The quality of print is critical in this application as any deterioration could result in lower read levels leading to unwelcome delays for the customer at the till where speed and efficiency are critical to high customer satisfaction," confirmed Simon Godbold, Sales Manager of Ashe Converting Equipment. "Such an outcome could mean the loss of a lucrative contract for Smart Farming's customers."

The new GS1 approach, where farmers are supplying pre-labelled produce, can result in tangible business benefits for the supermarkets in increased speed and efficiency and lower cost. GS1 DataBar can carry GS1 Application Identifiers such as serial numbers, lot numbers, and expiration dates, creating solutions to support product authentication and traceability for fresh food products and couponing.

NEWS IN BRIEF

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LONGCOMBE LABELS MOVES TO LARGER FACILITY

Devon, UK-based tag and label maker Longcombe Labels has moved factory from Totnes to Paignton. MD and founder Andrew Dean said that continued growth necessitated the move: 'After 20 years in our Totnes factory, to which we have added as the years have passed, we had simply outgrown the place. The new 18,000 square foot factory and office complex gives us room to breathe and will give both a more efficient flow of materials and extra storage space.'

Longcombe specializes in harsh environment tags and labels and sells to 30 countries worldwide. Dean reported that the move was completed successfully: 'Working over a weekend we lost less than three days production. Starting on Thursday afternoon, four Mark Andy rotary presses, three flat bed presses and all finishing, slitting and rewinding equipment were reinstalled and running by the Monday, absolutely on schedule.'

UPM RAFLATAC RESTRUCTURES RFID BUSINESS

UPM Raflatac is restructuring its RFID business by transferring tag and inlay production from the company's Jyväskylä facility in Finland to Guangzhou, China, and to Fletcher, North Carolina, USA. The Jyväskylä facility is to be turned into a development center.

The company also revealed that its RFID business, which currently has around 200 employees, will decrease by around 25 people. Plans concerning production transfer and development will be negotiated with employees according to local legislation. Opportunities for relocation within UPM as well as retraining will be handled as part of the negotiations. The proposed actions are estimated to be completed by the end of March 2010.

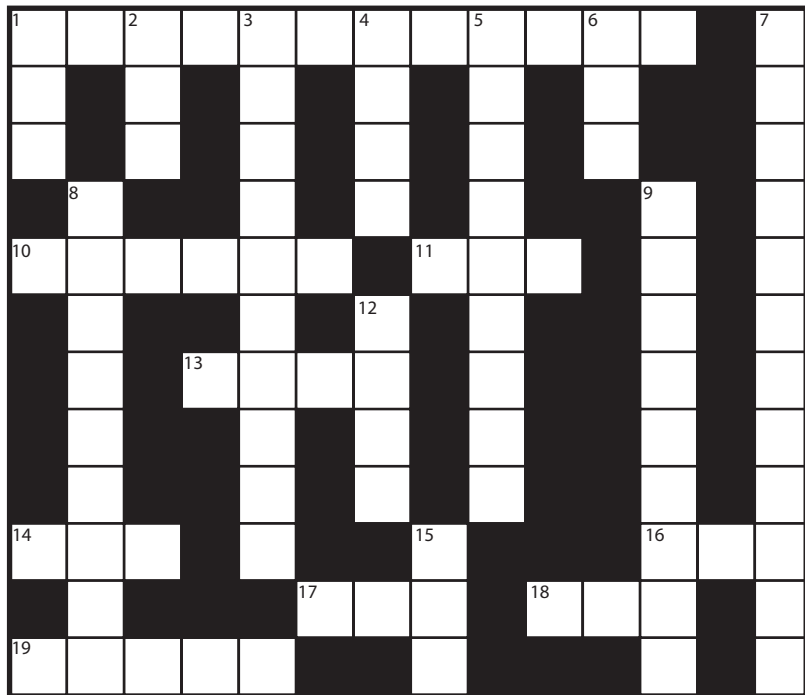
UNILUX OPENS CUSTOMER SERVICE CENTER IN DÜSSELDORF

Unilux has solidified its presence in stroboscopic surface inspection in Europe, the Middle East and Africa with the opening of its new marketing research center in Düsseldorf, Germany. The new facility will enable Unilux to increase its available inventory of strobe lights, spare parts and accessories for the steel, paper, textile and printing and converting industries to provide faster delivery. The EMEA office covers the continents of Europe and Africa plus countries in the Middle East.

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).

...you need this book

Labels & Labeling introduces the Encyclopedia of Labels and Label Technology – the first and only book of its kind for the label, product decoration, web printing and converting industry. Written by international labels guru Mike Fairley (with more than 25 years' experience), the Encyclopedia provides an easy-to-use global reference guide.

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End User Report:

Beer Market

MASSIVE CONSOLIDATION in the global beer market has been matched by widespread moves to PS, while opportunities for digital have opened up in the booming craft beer sector. Danielle Jerschefske reports

2008 was an exciting year for the global beer industry as it went through a period of massive consolidation. The growth in size of the top four global groups not only gives them a wider distribution network, but allows synergies in logistics, R&D and marketing at a time of rising commodity prices and an increasingly ferocious battle for brand recognition.

The first move came in January last year, when Heineken and Carlsberg climbed their way to third and fourth largest breweries in the world with the joint purchase of British brewer Scottish & Newcastle. S&N's Western European, US and Indian operations went to Heineken, while Carlsberg picked up the operations in Greece, France, Vietnam and China. Most

important to Carlsberg was gaining full control of Russia-based Baltika.

Then in June 2008, SAB Miller signed a joint venture agreement with 130 year family-owned MolsonCoors, merging the two companies' US and Puerto Rican operations. Pete Coors, descendent of the founder, has remained involved and was appointed vice chairman of MillerCoors.

'This transaction (was) driven by the profound changes in the US alcohol-beverage industry that are confronting both of our companies with new challenges,' said Pete Coors. 'Consumers are broadening their tastes and are increasingly looking for greater choice and differentiation; wine and spirits companies



are encroaching on traditional beer occasions, and global beer importers and craft brewers are both taking a larger share of volume and profit growth.' MillerCoors is set to invest \$100 million into the Golden, Colorado brewery and \$50 million into the Milwaukee, Wisconsin location over the next three years.

This merger gives MillerCoors a near 30 percent market share in the US and near 40 percent in Canada. It brings together super-premium brands such as Pilsner, Blue Moon & Sparks, premium beers Coors Light & Miller Light, and the below premium lines Milwaukee's Best & Miller High Life.

The third titanic deal of 2008 was AB InBev's acquisition of 150 year old family-owned enterprise Anheuser-Busch, making AB InBev the world's largest brewery. AB InBev now produces one quarter of the world's beer, worth about \$36.4 billion. At the time of the acquisition, Anheuser-Busch held just under half of the US beer market, and AB InBev plans to drive the Budweiser brand around the world using its newly expanded global channels.

CRAFT BREWING – A DIGITAL OPPORTUNITY?

Bucking the trend to global consolidation, craft beers are among the fastest growing segments in the beer industry. Annual sales in the US are about \$6.3 billion, growing 5.9 percent by volume and 10.1 percent by dollar value last year. This compares with overall US beer market sales of \$101 billion in 2008, up just 0.4 percent from 2007.

The average craft brewer is small, independent, and traditional. 'Small' means the brewer sells less than 2 million barrels. 'Independent' requires that less than 25 percent of the company is owned by a brewer that is not designated a craft, and 'traditional' means that it sells more malt beers than light or others. There are four main areas for craft brewing: microbreweries, brewpub, regional craft, or contract brewer. The fastest growing sector for craft brews is microbrew.

Quick Label Systems in Rhode Island supplies a range of small digital printing systems and materials direct to these brand owners, allowing them to print their own short runs of labels. 'By printing digitally, beer makers are free to make labels

for each unique brew without meeting the 'minimum purchase quantity' of labels required by commercial label printers,' says the company.

COLLABORATION IN PRACTICE

As global competition in the beer market intensifies, collaboration between materials supplier, converter and brand owner is allowing brands to score decisive marketing breakthroughs. An example is a color change label developed for Coors Light. The project started when the Coors marketing team approached Inland Label & Marketing Services, LLC, a well-known converter in the beer industry, for help in incorporating the 'cold and refreshing' aspects of Coors Light into the product's decoration.

'They wanted the characteristics to be visible and stand out when a consumer is looking at their brand,' says Jackie Kuehlmann-Skroch, marketing manager at Inland. 'Through consumer focus groups, Inland discovered that consumers would relate well if they could visually see that their beer was at optimal drinking temperature.'

Inland worked closely with LCR Hallcrest to produce a reliable, temperature-sensitive ink that would meet all Coors' quality requirements. 'The thermochromatic ink underwent rigorous testing to ensure proper temperature activation and color intensity in extreme conditions, while the label itself needed to perform to basic standards,' says Kuehlmann-Skroch.

Ink film thickness is critical for the thermochromatic capsules to work correctly, so the project started out using screen process. Eventually it was moved to gravure, where Inland was able to achieve high-end results at high speeds while laying down enough ink. In the end, the team found that a reversible water-based thermochromatic gravure ink was the best option to meet all Coors' quality demands.

The color changing label was launched in 2007, the corrugated boxes were introduced last year and the color changing can hit markets in May. Coors Light outsold its rival step-brother brand Miller Light in January of 2008 following a high profile marketing campaign around the temperature-





sensitive decoration.

STREAMLINE THE SUPPLY CHAIN

A key arena for competition between global beer brands is logistics – ensuring the correct products arrive at the correct outlet while minimizing costs – and RFID is well suited for these applications. In March, Carlsberg began using IBM software and RFID technology at Ringnes, Norway's largest brewery, to increase visibility in its logistics operations. RFID technology gives the brewery real-time data which tracks the arrival, departure, loading and unloading of all containers at the Oslo facility.

Ringnes believes its RFID project will reduce costs and make for more on-time deliveries; it has already helped the brewer

uncover and repair bottlenecks within its supply chain. 'Even small changes in our logistics system can have a positive effect on our bottom line,' says Jan Inge Bakkane, business process manager at Ringnes, 'The system we've created with IBM will allow our logistics operations to work smarter, which makes for better customer service.'

PRINT TECHNOLOGY TRENDS

Most high volume beer labels are still printed gravure despite the improvements flexography has made over the years. At the same time there is plenty of room in the market for short-run, custom solutions that are a perfect fit for digital printing systems.

At beer label converting specialist Spear USA, VP of marketing Dan Muenzer confirms that while the big runners tend to be gravure – for example Bud, Bud Light, Lite, Coors Light, etc - all other labels tend to be offset. 'PS labels are all either gravure or screen/flexo combination. My guess would be 70 percent gravure/30 percent offset on paper, and 90 percent gravure/10 percent combination on PS.'

Looking at materials, many big name beer brands have made the switch to pressure sensitive labels to reap the benefits of PS efficiencies, with Heineken and Bud Light leading the way. Spear USA's Dan Muenzer, believes that end users will ultimately invest in PS applicator machinery: 'Eventually beverage companies will make the switch because of the



LABELS&LABELING

WORLD'S LARGEST BREWERS 2009

- 1 – AB InBev - Belgium
- 2 – SAB Miller - UK
- 3 – Heineken - Holland
- 4 – Carlsberg - Denmark
- 5 – China Resources - China

WORLD'S BEST SELLING BEER BRANDS 2009

1. Snow – 61
2. Bud Light – 55.6
3. Budweiser – 43.4
4. Skol – 35.4
5. Corona – 32.7
6. Heineken – 29.1

* volumes in hectoliters



improved efficiency and increased speeds. The use of pressure sensitive labels in the beer market has steadily grown from 10 billion PS labels in 2006 to 18 billion in 2008.'

Previously a dedicated PS label converter, Spear USA built a mostly wet-glue South African plant in 2007 to support SAB Miller in the region, and purchased Precision Printing, a mostly wet-glue plant in Tennessee from Anheuser-Busch last year. The dynamics of Spear and its operations changed drastically, but it's all part of the plan. The converter has strategically positioned itself in wet-glue to slowly transform the business into PS film. With brewers implementing cost savings programs, Spear believes that PS efficiencies will help absorb the strain of cost/price pressures.

Laura Clark, Avery Dennison's food and beverage marketing director, points out that in 2008, PS beer labels grew between 10–20 percent in Europe and North America, while in emerging markets penetration was significantly lower. A number of brands converted to PS labels last year including Kingway and the Zhujiang Brewery in Asia, and Baltika and Efes in Europe. North American brands that have made the switch include MGD 64, Estrella, Tecate Light, Sol and Land Shark.

GLOBAL MARKETS

CHINA

Overall, China, with its low manufacturing costs, is a net exporter of beer.

Although the majority of beer sales are at pubs and restaurants, a significant percentage of volume beer sales in 2008 took place in the off market. As the infrastructure

surrounding supermarkets continues to grow in China, these trends have accelerated.

The Chinese government has shown itself sensitive to the implications of global mergers for Chinese brewing companies. Before the Anheuser-Busch/InBev merger was approved, for example, the Chinese government set some limitations to prevent monopolization of the market, because each company held significant stakes in popular Chinese breweries.

Anheuser-Busch held a 27 percent share in China-based Tsingtao Brewery, and in April 2009 AB InBev sold 19.9 percent of its shares in Tsingtao to Japanese brewer Asahi, while the remaining 7 percent was sold to a Chinese-native private investor. InBev still owns nearly 30 percent of China-based Zhujiang and 100 percent of Fujian Sedrin.

The world's largest brewer has divided its brands into tiered levels, positioning Budweiser at the top in China.

SAB Miller is in a joint venture with China Resources Enterprises, the producer of the Snow brands in China. Over 80 percent of the global brewer's sales in China are accounted for by the Snow brand family, and in March 2009 one consultancy claimed Snow as the world's number one selling beer brand as sales volumes jumped near 20 percent in 2008.

Carlsberg, meanwhile, has a stronghold in western China's beer market as the owner of the Kunming Huashi Beer





Company, Chongqing Brewery and the brewing division of the Xinjiang Hops Company.

Yanjing Beer and Henan Jinxing Beer are the only two domestic brewers without foreign partners.

Many investors believe that the long-term advantage in China's beer market lies with the multinational brands, building on consumer aspirations for globally branded products. These analysts believe that the high-end beer market in China will grow 75 percent by 2013.

INDIA

United Breweries Group is the largest brewer in India, holding 40 percent of the market.

SAB Miller holds second place with around 35 percent of India's beer market, much of which was gained with the purchase of Narang Breweries in 2000. Since then, it has invested \$650 million into the country. SAB Miller is also the owner of Foster's

India business, which grew by over 45 percent in Mumbai and Delhi in 2007. The company launched Indus Pride, the first beer it has specifically developed for the Indian market, late last year. Performance has been better than expected, with the brand already taking a 15 percent share of the mainstream beer market.

RUSSIA

Russia has grown to be the world's third largest beer market with the increase in disposable incomes and the shift in consumer demand from hard alcohol to something less potent. One quarter of the label sales at Okil, the country's leading label converter, are into Russia's beer market, mainly using gravure for clear-on-clear labels. The movement to PS in Russia has been led by Heineken, and a number of other breweries have followed suit.

Comments Denis Okulov, Okil's managing director, 'The trend to film labels for beer happened in Europe and North America three and a half years ago. Film labels came to Russia in 2007 and Okil was the first to print them.' Okil claims around fifty percent of the film clear-on-clear label market in Russia.

For several years now, Baltic Beverages Holding has been a driving force for Carlsberg in Russia, Ukraine and the Baltic Nations, and its Baltika brand has steadily increased its share to around 38 percent. Baltika (under BBH) completed its first foreign purchase last year by acquiring Baku-Castel, Azerbaijan's largest producer. Baltika brands have also experienced a 19 percent increase in exports, mostly to Uruguay, Argentina and Brazil.

AB InBev's Russian beer business, SUN InBev, is the second largest brewer in the market, with 19 percent market share, while SAB Miller trails with around 6 percent.

MEXICO

Mexico's largest brewer, Grupo Modelo – 50 percent owned by AB InBev - is battling for market share with Sol brand maker FEMSA, the country's second largest brewer with 40 percent of the market. Meanwhile, there is speculation of a merger deal between SAB Miller and FEMSA, both of whom share Coca-Cola bottling agreements, with FEMSA the largest Coca-Cola bottler in South America.



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PRECISION



THE use of booklet labels is on the rise

Small label, big impact

GERMAN-BASED LeoMat is receiving increased interest in its Booklabel machine as regulations and multiple languages drive additional content on many types of labels. James Quirk reports

Booklet labels are becoming increasingly popular, with their ability to hold more information than traditional labels catering to trends of multiple language requirements, promotional activities and growing legislation in sectors such as pharmaceutical labels.

German company LeoMat, a manufacturer of finishing and overprinting equipment, is reporting increased interest in its Booklabel machine, launched at Labelexpo Europe 2007.

'We are seeing a lot of growth in this area,' says sales manager André John. 'Because of the financial crisis, more and more converters are looking to new products in different markets in order to diversify. Therefore our customers are often new to making booklet labels, but they can benefit from our experience and expertise.'

The machine can produce booklet labels in different sizes and formats, and is available in the working widths of 330mm, 410mm and 510mm. It has a layout system that places the insert onto blank or printed base material. There is also the option of printing the base reel inline using a printing unit. The base material and the insert are attached to each other using a hotmelt glue applicator or a laminator. Then accurate die-cutting is carried out and the item is cut lengthways and rolled up by the non-contact main drive, which was specially developed for processing embossed products. These include booklet labels, RFID labels, Braille symbols and other sensitive products. The non-contact main drive works with deviating shafts and a powered, layered main conveyer shaft, helping to prevent damage to products.

John reports that LeoMat can customize die-cutting units to allow customers to continue using their existing magnetic cylinders, for example.

The Booklabel machine, which can reach speeds of 35m/min, is powered by PC-controlled servo drives that allow for accurate control of the web tension. Jobs can be stored and called upon again in the future. A control panel controls all the units centrally from unrolling to rolling back up, making the machine simple to use for the operator who has a comprehensive overview of what is happening. The intermittent application of the hot-melt

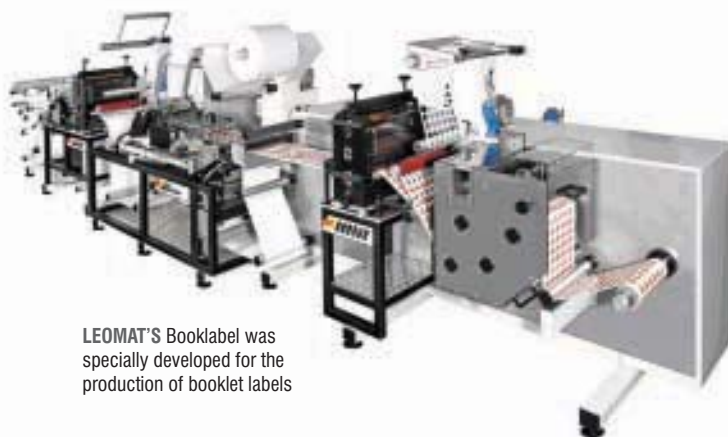
sticker is entered centrally via the LeoMat control panel.

In addition to grooved paper inserts – e.g. inserts printed in an off-set arc and then individually grooved over a groove machine – the layout system also accepts various different products such as tattoos and lenticular images (motion images).

Furthermore, the machine can also be used for precise layout die-cutting of pre-printing label reels at a speed of 100 m/min or for the production of blank labels at a speed of 250 m/min. An additional label dispenser or other components on the Booklabel system can also be integrated to allow numerous individual customer requirements to be met.

LeoMat also offers a specially developed assembly machine for booklet labels, which is equipped with large pulleys and a non-contract main drive. The large deviating shafts of the LeoMat BS ensure that the labels are removed from the base during the cutting process. This helps to avoid downtime and optimizes production. Standard label reels can also be produced.

André John cites the machine's flexibility as a key advantage: various options, such as label dispensers and inkjet printing units, can be integrated into the Booklabel. 'It is also a robust piece of equipment,' he says. 'All the components that make up the machine are of very high quality.'



LEOMAT'S Booklabel was specially developed for the production of booklet labels



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POLYTYPE Converting
SA coater at Bluestar

PET presents new challenges for silicone

BLUESTAR SILICONES' Pascal-Louis Caillaut considers the latest developments in silicone technology, including challenges facing the solventless thermal coating of PET release liners

Used in hundreds of everyday applications from baby bottles teats, cosmetics formulations, construction components, electronics & sealing and bonding materials, silicones are all around us. Due to their unique physico-chemical properties they have tremendous weathering, insulating, spreading, waterproofing and of course release properties. This last is mainly linked to the extremely low surface energy of silicones, and it is this quality that makes them so interesting in the world of PSA release. Low surface energy delivers other interesting properties such as lubrication, softening, hydrophobicity, water repellence and even adhesion, which are exploited in a wide range of applications.

In recent years the biggest challenges have been in the area of cost efficiency. Silicone actually contributes a minor proportion of cost to a self adhesive label laminate - under five percent - but is the absolutely key material that cannot be replaced. Therefore, whilst productivity remains a key target for the industry, quality must take precedence when silicone choices are made.

Actions which have been taken to improve productivity and cost-effectiveness include:

- Reducing the sensitivity of the formulation to the impact of Platinum (Pt), which can have a direct impact on the cost of silicone.
- The design of silicones which run faster or require less energy consumption via Low Temperature Curing (LTC).

At the same time, there have been interesting technology innovations, including the development of solventless thermal silicones for coating filmic substrates - and in particular PET for label applications.

For an industry typically dominated by solvent-based and UV silicones, there is a growing demand for a solventless thermal solution to coat basic PET film for label applications.

Typical markets for PET liners include:

■ **Clear on clear/no label look labels**

Very lightweight transparent face materials (PE/OPP) are used, and so typically very low release values are needed. Liners are moving to lower and lower calliper grades, so even more premium release will be required. Adhesives are typically untackified acrylic for excellent clarity, with UV hot melts also becoming more important.

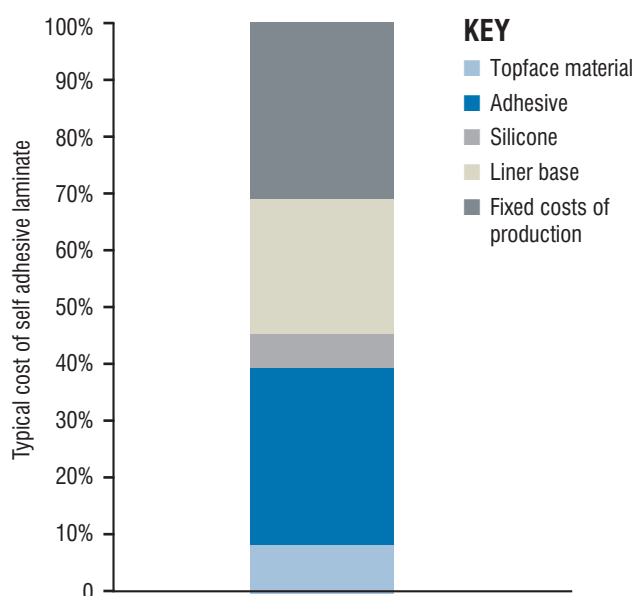
■ **Wine/beer/glass bottle labels:**

The main advantages of PET are its strength and water resistance in situations which present problems for paper liners. Adhesives are typically tackified acrylics, and release requirements require a modified silicone formulation.

■ **Paper replacement for standard labels:**

Today this is not very well advanced, but if PET cost/calliper is reduced adequately, traditional glassine paper liners could be threatened and the replacement substrate could potentially be coated at much lower silicone coatweights.

SILICONE COST GRAPH



CHALLENGES

But there are major challenges for thermal solventless silicone systems. While the quality of today's solvent silicone-coated PET is not really in question, many question if solventless can ever achieve the required quality. Solvent systems are also frequently a cost driven requirement of the market.

OTHER CHALLENGES INCLUDE:

- Good cure and immediate anchorage on non surface-treated PET films
- With or without corona treatment
- Anchorage with ageing under difficult storage conditions (for example, high humidity, high temperature)
- Premium release
- Modifiable release
- Low silicone transfer/good final label printability

For those considering coating with thermal solventless systems – including the growing number of label converters looking to coat in-house - there are some 'golden rules' to follow:

- Web temperatures in excess of 140°C are recommended to ensure long lasting anchorage
- Coating film is not the same as paper and good coating patterns may be more difficult to achieve
- Anchorage can be worse with lower coatweights
- All pure untreated PET films are not necessarily identical
- Corona can aid immediate anchorage but may not necessarily be advantageous for release or long term ageing of the coated film

BLUESTAR SHOWCASES PET COATING SOLUTIONS AT LABELEXPO

At Labelexpo Brussels in September, Bluestar will showcase its Silcolease Optima system, designed to tackle the challenges presented by PET film coating - including platinum reduction, low temperature cure (LTC) and fast cure running speeds with low misting.

Bluestar says that in industrial-level trials, the Optima system has run successfully with platinum levels down to 30ppm, with anti-misting performance up to 1600 m/min coating speed.

NEWS IN BRIEF

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MERCIAN LABELS LAUNCHES ONLINE TRADE SERVICE

Short run labeling specialist Mercian Labels, based in the UK, has launched an online, trade-only digital labeling service targeted at print resellers of self-adhesive labels across the EU.

In developing the new service called MeTra Digital, the company has combined its short run labeling expertise with the growing need for trade printers who want to enjoy the 'web to print' business model whilst supporting their clients with added value personal service.

MeTra Digital is only available online, at www.selfadhesivelabels.com/trade, to authorized trade resellers of digitally printed labels, and allows 24/7 instant pricing of any combination of digitally printed labels using the company's Xeikon print engine and inline converting unit. The price structure allows trade users who are familiar with labeling terminology realtime access to quote, track and trace digitally printed labels jobs, giving them the ability to offer the best service to their own customers and migrate traditionally flexographically printed jobs to the digital process. Supported by a dedicated team and trade only hotline, the new service offers fast delivery speeds and high quality short to medium run digitally printed labels.

Managing director Dr Adrian Steele said: 'Our award-winning Xeikon label printing solution is perfect for trade buyers, with easy online and realtime quoting including new cutters, fast deliveries and the ability to run practically any job in any run length. Mercian Labels has been a trade supplier for 40 years now, and this latest venture builds on our position as the domestic market leader in short run labeling. We look forward to the trade printing community benefiting from the investment in equipment and processes we have made with this project.'

ROTOCONTROL ENTERS PARTNERSHIP WITH CME

Marco Aengenvoort, Rotocontrol managing director, has announced a signed partnership agreement with CME Cleberger Maschinenentwicklung GmbH. The partnership provides Rotocontrol with marketing and sales responsibility for the CME dual rewind semi-automatic turrets (DRM) enhancing the current offering of Rotocontrol high-speed inspection, cutting and rewinding machines for the label industry.

SANDON APPOINTS AGENT IN SOUTH AFRICA

UK-based anilox roll manufacturer Sandon Global has appointed Printing Products as its agent in South Africa. The privately owned Cape Town-based company specializes in the supply of flexographic equipment and printing inks and also provides technical support for applications including shrink-sleeves, self-adhesive and sleeve labels. 'As a supplier of flexographic equipment and printing inks to the print industry, Sandon Global is an ideal fit that will combine technologies and play a huge roll for us with its technical expertise, quality and innovative ideas,' explained managing director Hannes Kritzinger. 'All are key issues that allow the end user to achieve greater results and savings on press.'

SCHOBER USA MOVES TO LARGER FACILITY

Schober USA has move to larger facilities in Fairfield, Ohio, USA. The new 10,000 square foot facility allows the company to provide additional services and capabilities to its customer base of North American converters, printers and manufacturing companies. Located in suburban Cincinnati, the new plant is convenient to the Greater Cincinnati and Dayton airports.



A demonstration of Capoeira, an Afro-Brazilian art form which combines elements of martial arts, music and dance

Successful return to Brazil for Label Summit

JAMES Quirk reports from Label Summit Latin America, held in São Paulo, Brazil

In its third outing in São Paulo, Brazil, Label Summit Latin America attracted 532 visitors from throughout the region. The event's conference program focused on a variety of important industry issues, from globalization and international partnerships to end user requirements and sustainability, while afternoon sessions were split between technology and business management. A table-top exhibition, meanwhile, provided over 40 local and international suppliers with the opportunity to promote their products and plans for the region.

The Brazilian label market is showing signs of resisting the worst of the global economic downturn, maintaining impressive growth this year of around 5-6 percent. Local converters' desire to invest and grow was reflected by the report from the Labelexpo Global Series, the Summit's organizer, that the exhibition part of the event attracted more visitors than in any previous year.

The Summit also benefited from a shift in format in the conference program. The afternoon break-out sessions allowed an increased focus on economic and executive challenges, while still providing a platform for specialized, educational presentations on areas such as digital technology, pre-press and RFID. Morning sessions, too, offered differentiation from previous events, with experts from Brazil, Argentina, Chile and Mexico providing increased insight into the Latin American markets and highlighting topics of particular relevance to the region.

Conference highlights included an excellent presentation from brothers Amin Silva Yedra and Fabian Silva Yedra, from Mexican label converter Etiquetas Anro. Discussing the challenges created by the arrival of the new generation to a family-run business, a particularly relevant issue in the label

LABELS&LABELING

industry, they emphasized the importance of separating familial and professional relationships while clearly defining roles within the company.

With the recent trend of US converting groups looking to invest in Latin American companies, Fernando Aravena provided a frank assessment of the acquisition of his former company Etiprak, a Chile-based label printing house, by North American company York Label. Aravena now owns label converting operations in both Peru and Argentina.

A panel session chaired by Labelexpo MD Roger Pellow, meanwhile, brought together John Hickey, president of US converter Smyth, and Jean Chatziefstratiou, director of Brazilian printer Prakolar. The interactive discussion focused on the potential in emerging markets and new areas of technology.

The Summit also witnessed an extremely positive reaction from both international suppliers and local converters to the news that L&L deputy editor James Quirk has relocated to the region and create a newsletter dedicated to the Latin American label industry.

Roger Pellow, Labelexpo managing director, commented: 'It was fantastic to be back with Label Summit Latin America in São Paulo for the third time, and to such a brilliant reception. It is an exciting time for the labeling industry in this region. We are looking forward to continuing our excellent relationship with the Brazilian association ABIEA and will definitely be back in 2011 with an even bigger and better educational event for the industry.'

DAY ONE

The first day of the conference, chaired by L&L group managing editor Andy Thomas, opened with a keynote presentation from



IN its third outing in São Paulo, Brazil, Label Summit Latin America attracted 532 visitors from throughout the region for the conference and tabletop exhibition

Gold Sponsor Avery Dennison. Joao Adao, general manager for materials in Argentina and Chile, gave an overview of the Latin American label industry in the context of the global market.

Adao was followed by Marcelo Prado, from a research group put together by Brazilian self-adhesive association ABIEA, who focused specifically on the Brazilian market. He looked at the geographical spread of business within the country – the state of São Paulo is home to 30 percent of all Brazilian companies – and noted that the label industry is gathered principally in the south-eastern states (70 percent) and the south of the country (18 percent). The industry is served by around 32 adhesive laminate suppliers and around 354 converters using face materials, papers and other laminated substrates.

Focusing on the laminators, the research found that 60 percent of companies are paper-based and 40 percent dedicated to films. Thirty-eight percent of the companies convert their own materials into labels.

The country's converters, meanwhile, were found to be employing, on average, 35 people. Just 23 percent of companies employ more than 50 staff. Seventy-two percent of converters operate one shift, while 22 percent work two shifts. Around 79 percent of converters operate in the food sector; 63 percent in pharmaceuticals and 60 percent in cosmetics. These three sectors, along with the beverage, agriculture and automobile industries, are all expecting significant growth.

Manoel Müller, president of ABEDesign, the Brazilian association of design companies, outlined the relationship between converter, designer and end user, and looked at the latter's

requirements from its customers.

'The end user's packaging strategy is directly related to the cost of the product's packaging,' he said. 'The partnership between end user and converter is defined by price, prompt payment, flexibility of delivery and free technical support.'

He looked at how this partnership between converter and end user would likely be affected by the economic downturn and by increased brand competition in the market, urging converters to propose new business models and increase their cooperation with branding and design.

Oswaldo Belintani, technical director of Brazilian converter Novelprint, then focused on security and brand protection. Novelprint has been one of the country's leading converters for some decades, while also manufacturing its own materials and label applicator machines. Moreover, it has in recent years dedicated a significant amount of research and development, in conjunction with universities and the Brazilian government, into security printing and nanotechnology.

After focusing on the scale of counterfeiting and looking at the sectors most affected, Belintani outlined details of a security printing project on booklet labels for bottles of agricultural chemicals – expensive products which are a frequent target for counterfeiters in Brazil.

The booklet label is printed on a flexo press with an inkjet unit which adds a unique code in invisible ink. An applicator, which can read the codes to verify them, is being developed to complement the process. The same codes also serve to automatically specify to which area in the country the pallets should be sent.

At the point of sale and of use, the code can also be verified by a reader which feeds the product information through a

computer to the manufacturer, who can check it against the database. In this way, the product can be verified at every step of the process – from printing and application to distribution, sale and final use.

Though debuting with agricultural chemical labeling, this process has potential applications in any area where the product is of high value and under threat from counterfeiting.

The afternoon session split between two streams: business management and technology. In the former, Labelexpo MD Roger Pellow chaired a discussion between John Hickey, president of US converter Smyth, and Jean Chatziefstratiou, director of Brazilian printer Prakolar, about opportunities and challenges in emerging markets and new technologies.

Fabio Matsui, director of consultant Cypress Associates, then focused on the increasing trend of mergers and acquisitions in the label industry. Latin America has witnessed some significant developments in this area in recent years: with converting giant CCL buying Brazilian printer Prodesmaq and US group York Label acquiring Chilean companies Cameo Marinetti and Etiprak, to name just two.

The technology stream focused first on digital printing, with Fernando Alperowitch of HP Indigo and Sean Skelly of EFI Jetrion giving detailed presentations about the benefits of digital printing and the opportunities it brings for entry into new markets. Rubens Wilmers of Nilpeter Brazil, along with Fernando Leiro of Argentine converter Artes Graficas Modernas and Fransico Paz of Brazilian printer Grif, then discussed adding value to the printing and converting process. Wilmers outlined various methods of increasing value – through processes such as combination printing and security features – while the converters discussed the technologies



MARCELO PRADO represented Brazilian self-adhesive association ABIEA



JOAO ADAO, Avery Dennison's general manager for materials in Argentina and Chile

which they employ.

The day ended with a presentation from Labels & Labeling's US-based reporter Danielle Jerschefske, who spoke about environmental sustainability. Her well-researched presentation focused on the trends among Brazilian end users, while providing information about developments in the US and Europe, areas where sustainability is now one of the key topics in the industry.

She outlined various ways converters can increase the environmental sustainability of their operations, while emphasizing the cost-effectiveness of doing so by citing examples of printers who have increased their profitability, and won new business, by focusing on this area.

DAY TWO

The second day of the conference, chaired by L&L deputy editor James Quirk, opened with Fernando Aravena providing a frank assessment of the acquisition of his former company Etiprak, a Chile-based label printing house, by North American company York Label. Aravena now owns label converting operations in both Peru and Argentina.

Manoel Manteigas de Oliveira, director of the SENAI Theobaldo de Nigris school in São Paulo, focused on training in the industry. SENAI's model of training, replicated throughout Brazil across a variety of industries, requires companies operating in a given sector to pay the equivalent of one percent of their wage bill to the school. This support allows the company to participate in the training at the school – whether it be through the donation or loaning of machinery or other training tools (which the company can then use to train its own staff) or through training the school's teachers.

Part of Brazil's National Confederation of Industry, SENAI now supports 28 different sectors through training services, and has graduated a staggering



33 million students since its foundation. It is the largest professional training organization in Latin America, and offers courses at all educational levels: from apprentices and technicians to managers.

A panel session then brought together a cross section of companies to outline the opportunities and trends in the beverage sector. Danilo Pereira of Brazilian beverage company AmBev, Luis Maria Garcia of Argentine converter Multilabel, Felipe Soto of material supplier Ritrama, and Marcos Silveira of applicator manufacturer Pavex discussed the growth of the sector in Brazil and Latin America and looked at the trends in materials and processes.

Brothers Amin Silva Yedra and Fabian Silva Yedra, from Mexican label converter Etiquetas Anro, discussed the challenges created by the arrival of the new generation to a family-run business, a particularly relevant issue in the label industry. They emphasized the importance of separating familial and professional relationships while clearly defining roles within the company.

The afternoon sessions again split between business management and technology. The business management stream focused on streamlining a business; Gece Renó, lean manufacturing manager of 3M Brazil

gave a case study of the company's in-house lean manufacturing project. Gustavo Virginillo, managing director of Coras and Christian Vorlander of Comprint then focused on financing options available in the industry.

The technology stream looked at pre-press, with Heysler Hey of EskoArtwork advising delegates on optimizing workflow and color management. UPM Raflatac's Mauricio Médici then focused on RFID, providing the audience with an introduction to chip technology, hardware and software and integration.

Médici said that preoccupations about the cost of RFID tags were now outdated: 'The technology is now very economical,' he stated. He gave a variety of case studies of applications where RFID has been implemented successfully, including at Top Food & Drug and the Hawaii State Department of Agriculture, and also looked to the future – citing the printing of organic RFID chips as the key next development for the technology.

The conference was concluded with a presentation from L&L editor Andy Thomas, who gave delegates a preview of some of the technological developments that will be on display at Labelexpo Europe in Brussels in September.

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Middle Eastern promise

ANDY THOMAS reports on the focused label conference and exhibition at GulfPack, Dubai

The Middle Eastern region is at the start of a long growth curve in the area of labeling, delegates to the 2009 Middle East Label Summit were told on the third day of Gulf Print & Pack held at Dubai's Airport Expo Centre.

This was the first time Gulf Pack & Print had hosted a dedicated label summit stream. The show is now owned by the Tarsus Group, publisher of L&L and organizer of the global Labelexpo exhibition and summit series.

Roger Pellow, managing director of the Tarsus Labels Group, said 'Europe accounts for some 36 percent of all labels produced in the world, followed by the US at 28 percent. But the Middle East is responsible for only one percent of worldwide label production, so the potential growth in this region is formidable.'

There was a strong presence of label supplier companies exhibiting at the show – many for the first time.

There was business for ABG on the first day of the show, when agent Secure Print Equipment Suppliers FZE (SPES), announced the sale of an Omega SR 410 slitter inspection rewriter for labels to M/sw Ajanta Packaging FZC of Sharjah. The Omega SR 410 is designed for the final finishing and inspection of high quality pharmaceutical and cosmetic labels.

Chandan Khanna, owner of Ajanta Packaging FZC, commented: 'We have been on the lookout for a slitting and inspection system for some time now and with the excellent references that AB Graphic International has in the market place, the Omega SR 410 was our obvious choice. The after sales service provided by SPES in the UAE is well known and I have known the Indian promoters of the company for many years now and have full confidence in their support.'

Tony Bell of AB Graphic International added, 'For the past few years we have not been paying enough attention to the Middle Eastern market. Starting in 2009 we have made this our priority market. You will see a lot of sales, marketing and service support going into developing this market and we will be showcasing our entire product range in the months to come. We are working on some innovative new projects for installation in the region.'

Nilpeter used the show to launch its new regional organization. 'The idea of having a local presence is to provide local service and support and a direct channel to buyers,' said Shyam Babu, managing director of Nilpeter Middle East. 'For us the show was great and we had visitors from Syria, Iran, Egypt, Morocco, Africa, Kuwait, Bahrain, Oman, India, and

Pakistan. We had a successful show and the feedback we got from the customer was more than expected.'

Soma's Ond ej Málek said he came back from Gulfprint 'with two books filled with new contacts. During Gulfprint Soma met more than 70 companies from Morocco, Kenya, Iran, UAE, Saudi, Egypt, India, etc. Gulfprint overcame our expectations and sales should come in a short time.'

Paolo Grasso, sales area manager for Omet, said that despite the world recession, the show had revealed 'good business opportunities' in the region.

This was digital press specialist Primera's first outing at Gulf Print. 'The show exceeded our expectations,' said David Riley, regional business manager. 'We met many qualified potential customers and used Gulf Print to launch our new product and the reception to it was great! I feel the show was a huge success.'

Also new to the show was MIS specialist Shuttleworth Business Systems. 'We are very pleased with the event,' said Paul Deane, joint managing director. 'The Middle East is an important market for us.'

Yalim Araser, Label division director at Turkish materials supplier Frimpeks, said the company experienced a lot of interest in its products from visitors from as far afield as Syria, Egypt, Morocco, India, Pakistan and Kenya. 'We fully expect to gain business as a result of this show and will definitely be confirming for the next one in 2011.'



TONY BELL (l), AB Graphic International congratulates Chandan Khanna (r), owner of Ajanta Packaging FZC, on the purchase of an Omega SR 410 slitter inspection rewriter



GAUTAM AND BHAVIN KHOTARI
in front of a Gallus EM280

Solution selling

LEADING INDIAN CONVERTER Interlabels has developed a winning formula which combines world-class PS label converting with turnkey applicator and data capture solutions. Andy Thomas reports

Interlabels, one of India's leading self-adhesive label groups, is now operating from its new purpose-built label plant, a 35,000 sq ft manufacturing and administration facility located alongside a major highway on the outskirts of Mumbai.

The company has thrived by offering a total service solution which combines pressure-sensitive label converting, label applicator manufacture, production of its own PS substrates and logistics management solutions. At the same time it has expanded its label converting operations across India and into Africa, with the set up of Interlabels Africa Ltd in Nairobi, Kenya.

Interlabels services a wide range of industry sectors, including cosmetics, toiletries, lubricants, pharmaceuticals and detergents. An impressive blue chip client list includes P&G, Indian Oil, LOreal, Hindustan Unilever, Colgate, Castrol and Reliance Industries.

The business is run by brothers Bhavin and Gautam Kothari, who remain optimistic about the company's prospects despite the global downturn:

'The economy is down – but this is as much psychological and in the real world,' says Bhavin. 'There are still a lot of opportunities for PS penetration in India, particularly in areas like foods, beverages and pharmaceuticals. A point of concern at the same time is that a lot of equipment has come into India in the last year, capacity has increased and there has been a sharp increase in the cost of labelstock.'

Adds Gautam, 'The food and pharma sectors are still fairly safe, and people are spending more on cosmetics and healthcare products.'

Interlabels has certainly managed to maintain its strategic investment program. The nationwide operations include satellite plants at Delhi and Kolkatta besides the main plant in Mumbai. The Delhi operation is set to expand into a green field production plant to give Interlabels additional capacity in the North of India and new investments are planned in the Kolkatta operation which services customers in Eastern India.

The Kenya Interlabels plant has meanwhile gone through an expansion program with the installation of a new 420mm-wide 10-color Nilpeter FB3300. It services a growing market in the

edible oils, motor oils, liquor and water sectors.

'Kenya is more developed than India in terms of PS penetration and the multinationals are very active,' says Bhavin. 'We were exporting labels from India, when we realized that if we put in a press in Kenya, we could increase our business and avoid 25 percent import duties on the label.'

TRAINING AND LEAN

A key focus for Interlabels during the tough times has been investment in its human resources – the real key to a Lean operation. A US-based consultancy was brought to India to spend two weeks with Interlabels' staff. One press was taken out of production to allow in-depth operator training.

Why bring in an outside consultancy? 'I am a businessman and I do not think like a printer,' concedes Bhavin Kothari. 'Getting a white outsider meant that people will listen. It made them feel that this was important.'

The strategy certainly paid off: 'We were wasting a lot of materials and worked hard on this. Our six month plan is to increase our productive capacity by 50 percent without investing in new machinery. We have already cancelled a press purchase because of the initial increase in efficiency.'

A key lesson from the consultancy was that the whole company needed to work as a team. 'Before, nobody interlinked,' recalls Gautam. 'People have now started working with each other. We learned that we had to give more importance to pre-press, particularly discussions with production before going to press, which has saved us a lot of time and rework. At the same time we have introduced systems to improve our productivity and reduce waste.'

The press crews have been made fully responsible for press maintenance, and for handing over the press to the next shift in a proper condition – critical for an operation which runs 24/7. The factory bus does not leave until a press has been properly handed over. Says Bhavin, 'Now we have a series of incentives so printers can share in the savings they make in terms of wasted materials and downtime.'

The project has been accompanied by a Lean program



LONGFORD booklet label machine - Interlabels is seeing good growth from this business area



QUALITY control is a major priority, as investment in this Leomat rewinder shows

throughout the rest of the plant, which has led, for example, to a reduction in invoices from 800 to 500 a month. The company runs a complete Shuttleworth MIS system, which provides key tools for implementing the Lean program.

'Future success depends upon using ideas from the workforce now that a mindset of cost saving has been established,' adds Gautam. 'This teamwork has led to less waste and higher productivity.'

CUSTOMER FOCUS

'Indian customers' expectations are as high as anywhere else in the western world, and quality is an absolute must,' says Gautam Kothari. The question is – are they prepared to pay for quality and service?

'It is difficult to price service when competitors are selling below cost price,' responds Bhavin. 'Buyers are smart, all of which eats away at margins.'

There is still a 'price fixation', according to Bhavin, although this is changing among the company's top customers, who know that offering labels at 20 percent below cost price is simply not sustainable.

To succeed, label converters have to think like consultants. 'You need to keep asking – why should the customer buy from you?' says Gautam.

Interlabels has a couple of answers. Firstly, the company tries hard to involve itself early in the label concept. Designers are brought in to discuss how digital artwork should be presented and what are the decoration possibilities of the company's narrow web equipment.

Secondly, Interlabels is also able to consult on the whole label chain, from supply of the laminate, to the applicator, and beyond that to complete logistics solutions. We now turn our attention to this aspect of the company structure.

COMBINED OPERATIONS

Interlabels has been manufacturing labelstock as well as printing labels since 1989. Indeed, in 1993 the company claimed to have been one of India's biggest labelstock producers. The company even designed and built its own hot-melt coating and siliconising lines. However after world leaders like Avery



OVER 100 label applicator systems were sold by Interlabels last year

Dennison and other multinationals began setting up manufacturing operations in India, Interlabels' own manufacturing is restricted to specialities only - the bulk comes from Avery Dennison and Raflatac.

But this history does give Interlabels a deep expertise in specifying and advising on materials. This is backed up by a strong quality control culture. The company is ISO 9001:2001 accredited and tests inks, adhesive and papers to ensure that every label roll is consistent. This quality mentality is backed up by heavy investment in state-of-the-art inspection rewinders from the likes of Rotoflex, Leomat and ABG, along with AVT inspection systems.

SYSTEMS BUILDING

Interlabels also has a highly successful equipment division. 'Our labeling equipment division is going very well and opening doors to end users,' says Bhavin Kothari. 'We can make new customers for our label converting division by helping them move to PS.'

Close to a hundred applicator systems were sold by Interlabels last year, and the target for 2009 is 150. Pharma has been a particularly successful market, but success has also come in the FMCG and lube oil sectors.

Interlabels' Intercode Solutions division, meanwhile, is the vehicle for a number of international partnerships, which have allowed the company to extend its offering through the supply chain by offering comprehensive bar coding solutions.

These partners include Sato Corporation Japan, which manufactures



GAUTAM (left) and Bhavin Khotari, joint owners of Interlabels, outside the new Mumbai plant

MUMBAI CONVERTING PLANT

Interlabels' new Mumbai plant contains a number of roll-label presses, including multiple Kopack 250 6-color letterpress machines, and Gallus EM280 combination UV flexo presses.

Booklet labels, which allow customers to add product information in multiple languages are a fast-growing part of Interlabels' business. The company recently installed a complete booklet label manufacturing line to apply the offset-printed multi-page labels.

Like most label converters today, Interlabels has taken a hard look at digital, but presently decided against. 'Digital needs a big investment and buyers in India will not compromise on shades,' says Bhavin. 'Moreso a lot of our short run jobs have a lot of embellishments on them like foiling and screen. We really believe that semi-rotary letterpress and offset may be more suited options currently.'

hand-held labelers, industrial bar code printers, and mobile printers. Data capture solutions and wireless and mobile computing solutions come from Motorola and Intermec USA.

'We provide consultation and training to select the right product for an application, whether this is for automation and logistics applications, warehouse management, or retail scanning and electronic point-of-sale,' says Bhavin.



HEIDELBERG: Tipografic switched to infra red-drying on its new Speedmaster XL 105-6+L

TIPOGRAFIC

HEIDELBERG SPEEDMASTER XL 105
UK-based converter Tipografic has moved one of its sheetfed presses from UV print and drying to conventional inking and infra red drying. Its latest press investment, a Speedmaster XL 105-6+L, means a better balance between UV and conventional production.

'We are reacting to a change in the market place, making an investment that reflects the increasing cost and environmental consciousness among buyers,' says managing director Jeff Cornell.

The XL 105 has replaced a CD 102 press to give the company 30-40 percent higher productivity from the start.

'I first saw the XL 105 when it was unveiled at Drupa 2004. It looked impressive but we like to buy when a press is proven and in the market for at least two or three years. This is now proven and the reports we have had from users have been very good. It's an impressive machine,' says Cornell.

The company is producing wet glue

labels and is finding that work for the canning industry is thriving despite the recession.

'Households are looking for cheaper ways of getting food on the table so soups, beans and pastas are popular. It really is a good year for canning,' he says.

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AB GRAPHIC DIGICON 2

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INFO LABEL

HP INDIGO WS6000

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'The HP Indigo WS6000 now uniquely enables us to offer medium to long runs of digital labels and flexible packaging with exacting registration and eco-friendly benefits that digital printing affords,' said Mark Dufort, president of Info Label.



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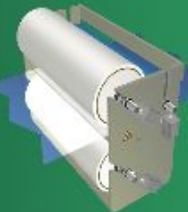
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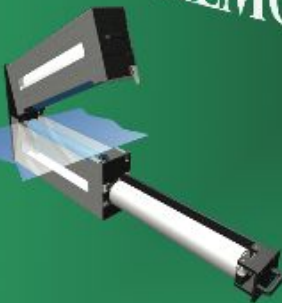
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Custom solutions

THE ABILITY OF INDIAN COATING SPECIALIST SMI to offer high quality, customised solutions has proved a formula for success in a market dominated by rapidly changing packaging formats. Andy Thomas reports

SMI Coated Products has thrived alongside the dynamic, competitive and quality conscious Indian pressure-sensitive label industry by offering a high level of quality assurance along with customised laminate solutions.

Founded in 1994, this family-run business became a registered limited company in July 2004, expanding its services across India and then into global markets.

SMI exported its first products just three years ago and today around one half of

SMI's production goes for export to more than 20 countries. 'We export to Europe, Middle East and Africa,' says company managing director Ajay Mehta. 'The major multinational companies have operations in India and requirements for high quality labels and label stock materials in India is being met consistently from our label stock solutions. Worldwide, label converting machines as well as applications for labels are very much similar.'

SMI runs a lot of trials for materials for new clients. 'Successful trials usually lead to regular procurement of label stock materials from SMI,' says Mehta.

SMI has achieved ISO 9001:2000 quality certification and installed an Enterprise-wide Resource Planning (ERP) network which helps ensure label

stock solutions are delivered on time and to specification.

SMI counts over 300 label converters among its customers, servicing the full range of end use applications from pharmaceuticals, lubricants, liquor and consumer goods to logistics and EDP. Converters can choose from more than 200 options in hot melt and water-based acrylic adhesives, in combination with a wide range of face stocks, including metalized papers, speciality thermal transfer and direct thermal stocks as well as PP and PE films. The adhesives vary from being permanent, removable, cold application to deep freeze grades.

SMI delivers PS label stocks in both sheets and rolls. The majority of raw materials are sourced from global suppliers and SMI does its own quality checks on raw materials before taking them up for production.

EQUIPMENT

At the new Ambernath plant is a stand-alone acrylic coater with a web width of 1200mm and running at speeds up to 150 m/min. The plant's slitter runs at 320m/min.

The silicone coater - 'possibly the world's most compact' according to Mehta - is designed and built by SMI's own operations team. A new silicone coater as well as a slitter is under

construction. 'Our strength is that we can turn round jobs quickly, mostly within days of receiving the order,' says Mehta.

Having started with acrylic coating at its Daman factory, SMI added hot melt coating five years ago at the Daman plant. After experiencing steady growth of 25-30 percent for eight years,

SMI has seen its growth accelerate to an average of 40-50 percent over the past three years, and the company owns a lot of spare land for future expansion.

"SMI has seen its growth accelerate to an average of 40-50 percent over the past three years"

MARKET TRENDS

SMI's commitment to customised solutions has proven especially relevant in India, with its multiplication of new packaging formats. Paper remains the dominant PS face material in the Indian market, while filmic label stock production goes mostly to export markets.

So what is happening in end use sectors like Health & Beauty and lubricants, where one would expect to see a move to film in a fast-growing

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L-R Ajay, Swati and Rohit Mehta: 'bespoke solutions are key'



QUALITY control lab measuring all materials inwards and outwards

economy?

'The problem is cost here in India, and the end user has yet to be fully educated and see the other benefits,' says Ajay Mehta. 'In the lube market there are attempts to use film instead of paper. A major issue is counterfeit. They are worried that film labels can be easily removed and reused and that can be a problem. We have a destructible void security technology and there is considerable interest evinced in this solution.'

In the health and beauty segment, PS film are being used but have a long way to go. 'To take shampoo, 70-80 percent of product is sold in single-serve sachets,' says Mehta. 'Similarly in the household products market.'

In the pharma industry, the more sophisticated packaging formats have generally been for exports.

The burgeoning cosmetics industry is certainly seeing more use of hot melt and water-based filmic stocks, as are identification labels for consumer durable products, but this growth is from a very small base.

Going forward, analysts predict that the rapidly growing middle class will push the market towards higher value-added labels.

TROUBLE SHOOTING

In Mehta's opinion the quality level of labels and packaging needs to be coordinated along the entire supply chain. 'In many cases we go to label printers as well as end users, understand the requirement and suggest the right solution. Because the cost of

"label converters should never miss an opportunity to offer consultancy services to end users"

the equipment is high for them, we are now offering a service where we do the testing for them, to help the chain as a whole to move forward.'

Mehta says that label converters should never miss an opportunity to offer consultancy services to end users. 'Converters will otherwise be fighting on price rather than providing solutions.'

He gives an example where a lube oil label was breaking between containers on the applicator. 'The problem was that the cans were oriented the wrong way,' recalls Mehta. 'After identifying the problem, we changed the orientation on the line and the problem was solved. When the label converter buys label stock solutions, they should tell us where the label will be applied, so they end up buying the right product from us.'

A key to SMI's success has been heavy investment in in-house testing facilities for raw materials and final products. Its QA department tests and benchmarks a wide range of variables including printability, release characteristics, adhesive properties and silicone coating accuracy. Samples are stored for six months and are fully traceable through the plant. 'Consistency is the key,' says Ajay Mehta. 'We make sure our products are relevant solutions which function every time, the way they should.'

NEWS IN BRIEF

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ABBAY LABELS GAINS BRC ACCREDITATION FOR FOURTH CONSECUTIVE YEAR

Abbey Labels, of Bury St. Edmunds, Suffolk, UK, has gained full accreditation to the Global Standard for Packaging and Packaging Materials Issue 3 by the British Retail Consortium (BRC). This allows the company to produce food labels in accordance with the stringent requirements of supermarkets and other major perishable food suppliers. Sales director Francis Milne said: 'This is now the fourth year that we have secured this prestigious accreditation and during that time it has brought in many important, food related label orders which have all ended up on the supermarkets' shelves.'

STRATOS TO SELL MADICO LABELSTOCKS IN FRANCE

Madico Graphic Films, a supplier of specialist pressure sensitive, coated film products for durable label applications, has appointed Stratos as a French distributor for its expanding range of self-adhesive roll-label substrates.

Stratos, based in Saint Ouen L'Aumône, specializes in the self-adhesive roll label market and offers label converters slitting and supply services for small and medium quantities. As an approved Madico distributor, Stratos will have specific focus on supplying Madico's labelstock ranges throughout France, where it has over 500 customers.

ARPECO APPOINTS LPP AS UK DISTRIBUTOR

Arpeco, a Precision Automation company, has appointed LPP Limited as its new distributor for the UK and Ireland.

LPP formed four years ago by Les Bradley and Fred Osborne, is an independent equipment supplier specializing in the self-adhesive label and narrow web packaging markets. The owners of LPP Limited have over fifty years of experience in the supply of capital equipment, service and spare parts to the label industry.

Explaining the appointment, Brian Ivens of Arpeco said: 'LPP Limited is a company that is big enough to cope and small enough to care.'

INSTALLATIONS



DAVID LEE (L) welcomes Russian Focus agent Michail Nesterenko (see p.17)



ANDY STOKES, production manager of UK Labels with the Focus Webflex press

DE PRODUCT LABELS/UK LABELS

FOCUS PROFLEX AND WEBFLEX 330

Focus Label Machinery has installed presses at two UK label converters. North Lanarkshire-based DE Product Label recently installed a 13in 6-color Proflex 330 press, equipped with two die stations and a sheeting station. The press offers both UV drying and infra red lamps with forced cold air, allowing faster drying speeds without heat build up. The removable print cassettes can be interchanged or removed from the press in a few seconds, allowing very fast job changes and cleanups.

David Edwards of DE Product Labels commented, 'The Proflex has proven to be the perfect choice for us at this stage in our development. It has all the sophistication of larger, more expensive presses, but still has a relatively short web path and remains a nice, compact design. More importantly, it has increased our productivity considerably and it gives us plenty of options for the future, since the Proflex is modular and we can add to it as we need to. The new press has enabled us to produce a higher quality of work, which in turn, is opening doors in new markets for us.'

UK Labels Ltd, based in Oldbury, West Midlands, has meanwhile installed a 6-color Webflex 330 press. Already well established in the production of blank labels, laser sheets and printing in both roll and sheet formats, UK Labels now intends to raise its profile in high quality multi-color label printing..

Andy Stokes, production manager of UK Labels, commented: 'Even in the present economic climate we are seeing greater demand for our wide range of products and in particular, multi-color work. This increase in demand has forced us to look at the purchase of new equipment and we chose the Webflex as the best combination of high quality machinery, together with flexibility and cost effectiveness. The installation of the 6-color Webflex allows us to further strengthen our position in the label marketplace in the UK, across Europe and Scandinavia and into the Middle East.'

The press has been specified to handle a wide range of substrates from unsupported films to labelstock and cartonboard. The modular design incorporates closed-loop tension unwind, six print stations, with Rapid Change Cartridge system, three rotary dies stations, laminating, slitting/pacing unit, rotary sheeter station and rewind.

Focus director David Lee added: 'During recent months, the credit crisis has made the purchase of capital equipment increasingly difficult in the UK, so we are particularly pleased

that UK Labels has bucked the trend and invested in the Focus Webflex press.'

NEW FAITH, CHINA

MARK ANDY XP5000

Mark Andy celebrated the latest China installation of its Mark Andy XP5000 at the recent New Faith Printing Ltd. open house in Guangzhou. The event, hosted by New Faith, United Printing Equipment & Materials Corp. and Mark Andy, drew more than 140 attendees including suppliers, converters, end-users and media. The Mark Andy XP5000 is an 11-color press with twelve UV curing units, two cold foil units, one screen unit, and an integrated gravure unit. The press ran pressure-sensitive film label material at a rate of 330 feet/minute. This press marks the 100th press installation in China for Mark Andy Inc.

'The interest shown by the market in this open house demonstrates the commitment of the region to furthering flexo technology and applications,' states Paul Brauss, president and CEO, Mark Andy Inc. 'We are proud to support New Faith and United Printing as they lead the growth of the flexo industry in China.' Additional suppliers represented at the New Faith open house include Avery Dennison, DuPont, Flint Narrow Web, Kurz, Martin Automatic, Rotometrics, Sinhua, Stork, AVT, TESA, GEW, Auclean, BST and Esko.z

PILOT ITALIA, CARLUCCI

UV RAY LAMP RETROFIT ON GALLUS PRESSES

UV Ray has successfully carried out UV lamp retrofits on Gallus presses at leading Italian converters Pilot Italia and Carlucci. In both cases a 7 lamp retrofit was installed, plus an additional lamp between the first and second colors.

Installation was achieved within two days without the need for any press modification and keeping the original water cooling system. Just one UV Ray lamp was installed per unit in place of two, and savings were realized in terms of consumption, spare parts, maintenance and less requirement to adapt new electrical systems.

According to the company the system realized a 300 percent increase in production capacity, and the Gallus presses were able to print on film.

Key features of the UV Ray reflectors include lamp extraction on all units - including the interdeck - reduced energy consumption, low processing temperature and easy maintenance.



HEIDELBERG: Tipografic switched to infra red-drying on its new Speedmaster XL 105-6+L

TIPOGRAFIC

HEIDELBERG SPEEDMASTER XL 105

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Gallus launches direct Screen imaging

GALLUS Screeny plates can now be imaged on the same Luescher Xpose! system as flexo, letterpress and offset plates. Andy Thomas reports

Gallus has unveiled another option for the digital imaging of its Screeny plates using the Luescher XPose! CTP imager.

At Labelexpo in Chicago in 2008, Gallus Rotascreen made its first move into digital screen integration with the launch of Screeny Digital printing plates. This system required plates which have an ablative LAMS layer, which can be imaged using Esko CDI equipment. This allowed the elimination of film and the integration of screen into a flexo and letterpress CTP system.

The Lüscher XPose!, however, enables all the conventional screens in the Screeny standard line - including the Screeny S-Line - to be imaged directly using a UV laser. The existing process steps of washing out, drying and mounting remain unchanged.

Because Lüscher devices can be equipped with different types of lasers, the system can also image a wide range of plates including offset - both conventional and thermally imaged - flexographic plates with a LAMS layer, letterpress plates, digital films, conventional Screeny screen printing plates and Screeny Digital plates.

The Lüscher device is equipped with a dedicated register system which can be retrofitted to existing devices. The Screeny format is fixed using a vacuum punch.

A big advantage of Luescher's scalable solution is the extremely short imaging time. A screen 530 mm long is imaged with a 32-diode UV head at 2400 dpi within two minutes. 'This beats other products available on the market hands down,' says Dario Urbinati, product manager Screeny. Resolutions of 4800 dpi and 8000 dpi are also possible.

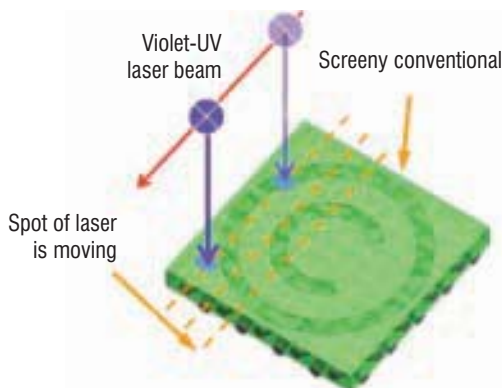
'The benefits for printers are clear,' says Urbinati. 'Firstly, the integration of rotary screen printing in the digital workflow of flexographic, offset and letterpress printing, which means that no investment in special screen printing equipment is required. No changes need to be made to existing, tried-and-tested processes and no new sampling of print results is required after switching to the digital workflow. Top-quality imaging of Screeny screen printing plates can be achieved with tried-and-tested equipment in extremely short process times along with a significant reduction of total costs.'

ALTERNATIVE A: Gallus Screeny Digital imaged on Esko CDI

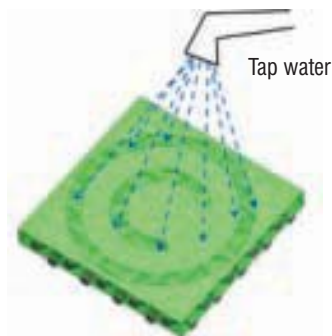


ALTERNATIVE B:

1. Gallus Screeny conventional imaging



2. Screeny washed out with tap water - the standard process used today



3. The familiar Gallus Screeny screen printing plate



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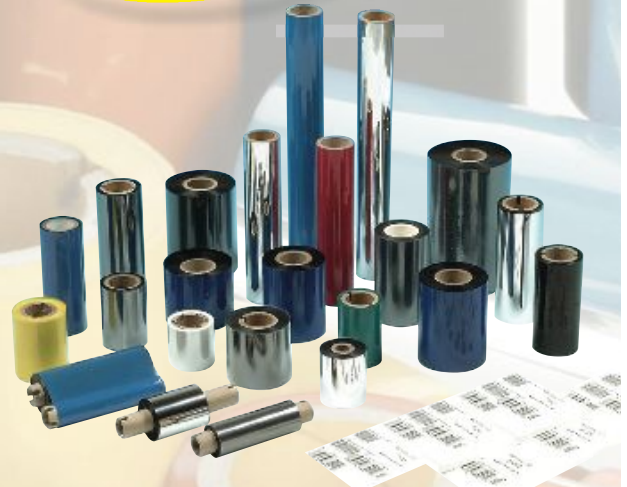


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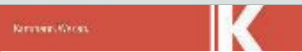
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CORPORATE CULTURE



The Four P's of Strategy Creation

RON PRICE is the founder and CEO of Price Associates and author of *Finding Hidden Treasures*.

Businesses need some way to monitor both the execution of their strategic plan and the changing environment in which they do business. A simple model '4P' provides a good structure:

PERCEPTIONS

There are six different stakeholder groups which help determine whether you're moving in the right direction:

- **Customers:** use a variety of feedback systems like cards, phone calls, emails, interviews, focus groups, and so on.
- **Employees:** Your employees have a big impact on your long-term performance, especially when you're trying to execute changes in strategy.
- **Vendors:** Do vendors view you as one of their prime customers, or as one of the troublesome ones?
- **Regulators**
- **Owners/shareholders:** The person/people who hold the purse strings play a major role in the company's strategy.
- **Community:** Chambers of Commerce, the media, other significant businesses in the area, or even the government. How these outside groups view your company can significantly impact your strategy.

PERFORMANCE

How are we doing implementing and executing on our strategy, including the goals and the timelines? Has anything

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changed from what we assumed when we created our strategic plan? What are the operational results that we're producing? How are we performing relative to the performance agreements that we established in the organization?

PURPOSE

Continually ask, 'What has changed internally since we met last?' Do we have some new strength that we didn't have before? Did we obtain some new equipment, technology, or intellectual property? Did we get some great talent that we didn't have before that should be impacting our strategy? Has there been a new limitation that's emerged since we last looked at this scorecard?' Based on your answers, where should you focus improvement efforts to create new value in the future.

PROCESS

Are you creating waste? Is there rework? Are there inefficiencies in your various processes? Are the processes really creating the results you're looking for? How should you adjust your resources? How can you create a sense of urgency and accountability?

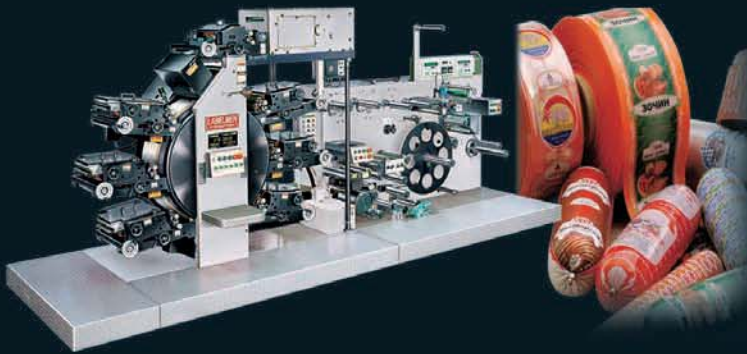
ABOUT THE AUTHOR:

Ron Price is the founder and CEO of Price Associates and author of *Finding Hidden Treasures*. For more information, visit www.Price-Associates.com

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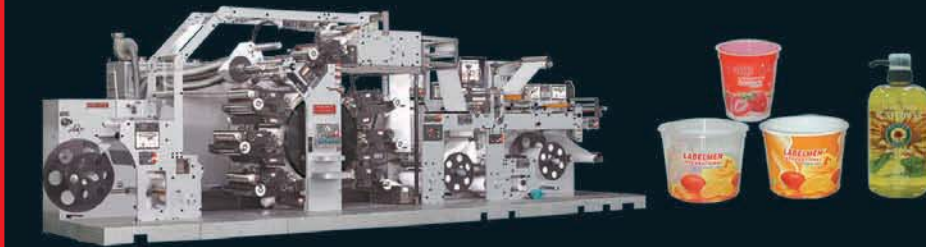
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