

2019 IN REVIEW

L&Ls global team on key regional developments this year

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L&L

– Meet the team

Labels & Labeling is the leading global information source for the label and package print converting industries with an editorial team located in the UK, North America, Latin America, China, India, Africa and Australasia



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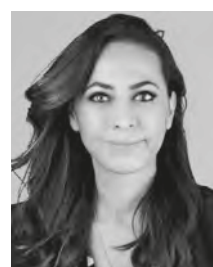
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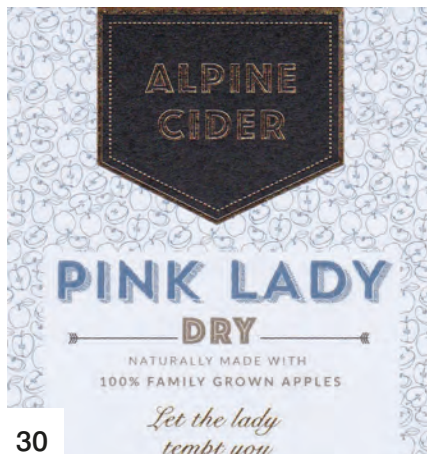


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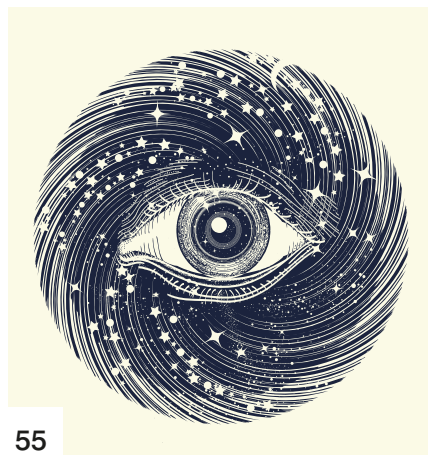
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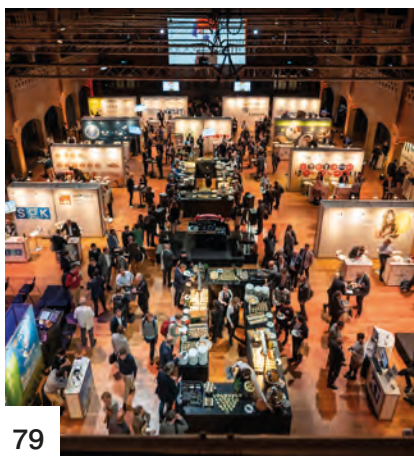
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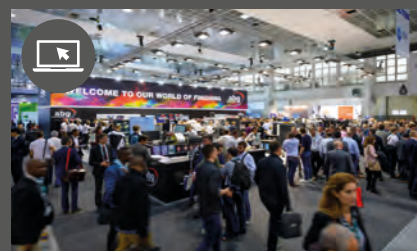
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Attractive labels can grab the attention of consumers. But what can make them hover a little longer is the fantastic finishing effects available to the label converter

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Climate change. Can we make a difference? (opinion)

We need to do more to protect the environment, writes Mike Fairley



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Thirty years ago (L&L issue 6, 1989)

Quality films from speciality supplier

A new clean room film coating plant, UL recognition and a range of specialty label, medical and industrial films products have at Smith & McLaurin on route for significant market expansion in Europe. Mike Fairley examines these developments.



Changes and opportunities for the 1990s

Kocher + Beck have recently opened new facilities for the production of flexible dies, engraved rotary tools and printing plates. Label consultant Ron Spring looks at the company's development and products.



Blumer: still pioneering label technology

The company was founded by his grandfather in 1897, when it was involved in iron working. Through the 1920s and 30s manufacturing developed into automatic winding machines, and it was not until 1954 that the company became involved in labels.



Changing technology brings new opportunities

Advances in bar code and variable information printing are providing new opportunities and challenges for the label industry. Labels & Labelling talks to one of the UK's pioneers about the developments taking place.



P14-15 Mike Fairley visited film manufacturer Smith & McLaurin, which had opened a state-of-the-art coating facility near Glasgow. An investment worth then 2.2m GBP set the company up for significant market expansion across Europe. L&L reported on its new clean room film coating plant, first-in-Europe UL recognition and a range of medical and industrial films in the company's portfolio.

P26-27 Label consultant Ron Spring visited Kocher + Beck's new facilities for production of flexible dies, engraved rotary tools and printing plates. Kocher + Beck was the first European die-maker to commercialize flexible wraparound dies. Spring learned about the new 3,000sq ft factory in Pliezhausen near Stuttgart in Germany, the company's development plans and new products.

P34-35 L&L spoke to Hans Blumer, owner of Maschinenbau Blumer and grandson of the founder, and reported on the company's new Atlas range of equipment, claimed at the time to set the new industry standard for label punching. We also looked at how this family business has developed on the market and how the Swiss approach to business benefited the company.

P48 L&L spoke to Harry Clark, managing director of KTP, better known as Kings Town Photocodes, about the advances, opportunities and challenges in barcode and variable information printing in the label industry. KTP was the first producer of barcode film masters in the UK and at the time was supplying more than 50 percent of the market.

Challenges and opportunities

Editor's note

In this issue of Labels & Labeling, our end-of-year edition, we take stock of developments in 2019 and look ahead to the trends, challenges and talking points likely to dominate the label and package printing sector in the year ahead.

Our global editorial team takes a look at various markets: Europe, North America, Southeast Asia, China, India and Africa. Some common themes emerge. Growth has slowed – both in economic terms and within the label industry (not unrelated, of course) – in the developed markets of North America and western Europe, which are also facing challenges relating to a shortage of skilled labor and concerns around environmental sustainability.

Challenges are to be found in the developing markets, too, particularly with regard to tighter regulatory environments

“In this edition, we take stock of developments in 2019 and look ahead to the trends, challenges and talking points likely to dominate the label and package printing sector in the year ahead”

in India and China. But there is plenty of scope for optimism. Under pressure, creative converters are finding new opportunities in areas such as flexible packaging and smart label applications.

So where will growth come from in the near future? In his column in this issue of L&L, Mike Fairley points out that six of the forecast top ten GDP growth markets by 2024 are all in Africa, while the likes of China, India, and Southeast Asia are all still showing solid

growth.

With sluggishness in the global economy, IMF projections for 2020 show global growth at just 3.5 percent. But the label industry has largely grown at between 1 or 2 percent above GDP worldwide for many years, so the long term label industry trend of global growth of somewhere between 4 and 6 percent still seems achievable. But that is likely to be largely attained in the world's biggest growth markets in Asia and Africa.

The developed label markets of Europe and North America undoubtedly have their own challenges to remain competitive, with investment particularly targeted at efficiency, productivity, workflow automation, waste reduction and environmental performance. The industry has had its challenges before, but, as Fairley writes, 'it is probably the most adaptable and technology sophisticated of all the print sectors'. It may become more streamlined, more automated and more environmentally conscious – but it will undoubtedly survive and continue to grow.

James Quirk
Group managing editor

News



Ritrama is an Italian multinational group specializing in self-adhesive products

Fedrigoni Group acquires Ritrama

Deal worth between 250-300 million EUR

Fedrigoni Group, a Verona, Italy-based manufacturer of specialty papers for packaging, fine printing and self-adhesive labels, has signed an agreement to acquire Ritrama, an Italian multinational group specializing in self-adhesive products. According to a source quoted by Reuters, the deal is worth between 250-300 million EUR.

Ritrama has manufacturing facilities in Italy, Spain, the United Kingdom, Chile and China. The Rink family, founders of Ritrama, will maintain ownership of and continue to manage Ritrama's North American operations, while continuing its business partnership with the rest of the group.

This acquisition, the second since Fedrigoni's acquisition by Bain Capital, strengthens Fedrigoni's position in the European pressure-sensitive label market, in which it operates through the Arconvert and Manter brands. The acquisition combines Fedrigoni's expertise in the production of wine labels (for which it is the second-largest producer globally), and in the production of labels for the food, household and logistics markets, with the advanced self-adhesive technologies of Ritrama, a global producer of labels for the pharmaceutical, beverage and personal care markets. Ritrama, through its graphics and industrial segments, complements Fedrigoni's portfolio.

'Strong synergies exist between the businesses of Arconvert and Ritrama,' confirmed Marco Nespolo, CEO of the Fedrigoni Group. 'Both companies operate with excellent results on largely complementary markets, with Arconvert specializing in self-adhesive labels manufactured from specialty papers, and Ritrama focusing on the production of self-adhesive plastic films.'

'Our pressure-sensitive labels segment, which is already showing very positive results, will now be larger, broader and more competitive in a market that continues expanding in all segments and geographies, on a global level. Ritrama has a healthy, truly Italian, yet international, DNA, just like the Fedrigoni Group.'

Ritrama's total revenues of approximately 400 million EUR in the year ended December 31, 2018, coupled with Fedrigoni's total revenues of approximately 1.2 billion EUR in the same period, amount to total revenues of the combined group of approximately 1.6 billion EUR.

The transaction is expected to close in the first quarter of 2020, and is subject to certain closing conditions.



The transaction has established a partnership between Heidelberg and ICP Group

Heidelberg sells Hi-Tech Coatings

Press manufacturer will distribute ICP's coatings

Heidelberg has sold its Hi-Tech division for coatings used by the packaging, labeling and printing industries to Innovative Chemical Products Group (ICP Group) as a part of an initiative to focus on core activities and portfolio adjustments.

Hi-Tech Coatings develops and produces over 1,000 environmentally compatible products and formulations, primarily water-based and UV-based coatings, at its sites in Aylesbury, UK; Zwaag, Netherlands, and Michigan, USA. With the sale, three sites and a total of around 60 employees will be transferred to ICP's ISG division.

The transaction also established a strategic partnership between Heidelberg and ICP Group to ensure Heidelberg's future sales of its coating portfolio. The purchase amounts to 38.5 million EUR (42.5 million USD). Heidelberg expects the transaction to generate non-recurring income of around EUR 20 million (22.1 million USD). The sale is expected to be effective in 2019.

'As part of our portfolio analysis and concentration on our core activities, we have come to the conclusion that we are withdrawing from our own production of packaging and printing coatings,' said Rainer Hundsdörfer, CEO of Heidelberg. 'We will use the funds released as a result to push ahead with strategic investments for the future on the path to our digital transformation.'

Following the sale, the partnership with ICP Group will ensure future sales of packaging, labeling and print coating products via Heidelberg.

'The strategic partnership with ICP Group will enable us to offer our customers an expanded portfolio of coatings,' said Prof Dr Hermann, member of the management board of Lifecycle Solutions at Heidelberg. 'Above all, we want to further increase the proportion of consumables through our growing contract business. This is where we will continue to trust in Hi-Tech Coatings and ICP Group's products in the future.'

Meanwhile, Martin Sonnenschein has been appointed as the new chairman of the supervisory board of Heidelberg. He was appointed a member of the supervisory board at the end of November by the Mannheim Register Court and took over as chairman on December 1. 'Dr Martin Sonnenschein has many years of comprehensive industrial expertise in the areas of strategy and transformation that are important to Heidelberg. Thanks to his management experience, he will play a valuable role in being a sparring partner for us,' commented Rainer Hundsdörfer, CEO of Heidelberg.



Read more about the deal in the next issue of L&L

News



Pawandeep Sahni (left) will lead Omet in India and the subcontinent

Omet opens office in India

New subsidiary based in Gurugram, Delhi NCR

Omet has opened its Indian subsidiary Omet India, based in Gurugram, Delhi NCR, to deliver its sales and service experience in the Indian subcontinent region.

Since 2010 Omet's equipment has been exclusively sold and serviced in India through Weldon Celloplast, who will continue to represent the company in India along with other partners.

'The vision of establishing Omet India is to strengthen our existing relationships with our partners and provide a great service experience to our customers all over the region,' said Pawandeep Sahni, who has been appointed to lead Omet in India and the subcontinent.

The Italian press manufacturer considers India as one of important strategic markets to focus on, considering the country is forecast to become a 5 trillion USD economy by 2024-25. According to Omet, rise in the middle-class income, expansion of large-scale organized retail trade, increasing presence of e-commerce companies and increasing demand of packaged food in India are all indicators of an assured double-digit growth of packaging sector of the country.

'Omet is already an established brand in the Indian subcontinent with leading printers such as Huhtamaki PPL, Zircon, Renault, Pragati Pack, Any Graphics, Unique Photo Offset and many more respected printers as its customers. With opening of Omet India, we are looking forward to increasing our ever-growing list of customers and provide highly customized technical solutions to printers, as Omet is a global leader in providing such solutions,' said Paolo Grasso, head of global sales head at Omet.

'It is a very positive initiative for Omet to invest in an office in India. This will be a great support in terms of response and service to Indian customers. We at Zircon congratulate the Omet team led by Pawandeep Sahni and reiterate our commitment to increase our business and cooperation with Omet in coming days,' said Sanjeev Sondhi of Zircon Technologies who runs multiple Omet presses.

'A closer relationship with the industry and our customers will help Omet to develop innovative projects as well as improve business processes for our customers, hence continuing our philosophy of Innovation with Passion, globally,' said Marco Calcagni, sales and marketing director of Omet. 'In the coming years we expect Omet India to become yet another center of excellence in addition to our subsidiaries in USA, China and Spain.'

News in brief

ProMach acquires Jet Label & Packaging

ProMach has acquired Jet Label & Packaging, western Canada's largest producer of labels for a variety of industries. The addition of Jet Label expands ProMach's labeling and coding capabilities and provides customers across Canada with enhanced sales and support.

ProMach's ID Technology product brand has six existing label converting facilities throughout North America, with locations in California, Texas, Wisconsin, Georgia, New Hampshire and Ontario. ID Technology also provides a full range of labeling and coding systems, including both labels and machinery, all supported by a network of more than 15 sales and service offices. The addition of Alberta-based Jet Label now adds a seventh flagship converting facility as well as additional sales and service offices.

Mark Andy extends pre-owned program

With the recent introduction of second-generation digital presses, Mark Andy has extended its support to converters currently using older machines such as Digital One and Digital Series by expanding its certified rebuilt program.

According to Mark Andy, several Digital One and Digital Series customers are currently upgrading to the next generation of digital hybrid presses. Simultaneously the company is building an inventory of pre-owned machines for converters with a lower budget.

PPC acquires Popular Ink

PPC Flexible Packaging has acquired short run specialist Popular Ink, the fifth investment in line with the company's ambitious growth strategy. Illinois-based PPC acquired Fisher Container and Packaging Products Corporation in 2017, Temkin International in 2018 and HFM Packaging in 2019. All businesses have now been integrated into the PPC Flexible Packaging enterprise.

PPC, headquartered in Buffalo Grove, is a converter known from flexible films, bags, and pouches. It focuses on cleanroom packaging for healthcare and medical applications, 'better for you' snack and organic brands, produce, pet food, bakery and horticulture. The firm currently operates six manufacturing facilities in Buffalo Grove, IL, Mission, KS, Rome, GA, Payson, UT, Pewaukee, WI, and Colombia, South America.

UPM Raflatac opens distribution center in Russia

UPM Raflatac has opened a new labelstock slitting and distribution terminal in Chelyabinsk, Russia, to expand its offering in the Ural region. The new facility features two-meter-wide slitting capabilities and allows UPM Raflatac to offer an expanded range of paper, film and special products to customers in the Ural region.

The new terminal joins UPM Raflatac's Russian Terminal Network, which includes facilities in St Petersburg and Moscow region that opened in 2009 and 2011, respectively.

News



L-R: Pranav Parikh, director at Constantia Parikh; Alexander Baumgartner, CEO of Constantia Flexibles; Brigitte Öppinger-Walchshofer, Austrian ambassador to India; RS Sodhi, managing director, Amul industries

Constantia Flexibles opens Ecoflex plant in India

Sustainability a key focus of Ahmedabad site

Constantia Flexibles has opened the new Constantia Ecoflex plant in Ahmedabad, India. Over 300 guests attended the inauguration, including the Austrian ambassador to India Brigitte Öppinger-Walchshofer and RS Sodhi, managing director of Amul industries and sustainability expert.

'With Constantia Ecoflex Ahmedabad we are making a big step towards more sustainable packaging. This is not only a great progress in terms of sustainability for Constantia Flexibles but also the entire packaging industry. Together we can go into a greener future,' said Alexander Baumgartner, CEO of Constantia Flexibles.

Guests had also the possibility to find out more about the new Ecolam technology. It is a lightweight mono-PE laminate suitable for a variety of packaging applications and is part of Constantia Flexibles' Ecolutions product line. Due to its mono-material structure, Ecolam is fully recyclable, and its carbon footprint is approximately 32 percent lower than that of comparable products. It comes in different barrier grades to deliver the needs for a wide range of products.

'Ecolam is the first high barrier flexible packaging that combines the resource-efficiency of plastic with recyclability back into new packaging films,' said Prof Dr Achim Grefenstein, SVP Group R&D.

The Ecoflex plant opened after more than two years of reparations and test runs in September 2019. It has an area of 24,500sqm and currently employs 50 people. The number is expected to triple by the second quarter of 2020.

Inovar acquires Flexo-Graphics

Texas-based Inovar Packaging Group has acquired Flexo-Graphics, a label converter based in Wisconsin, to expand its footprint in the midwest.

Flexo-Graphics is Inovar's first platform company in the midwest, adding to its existing manufacturing capabilities in the New England, the southwest and the southeast.

'We are thrilled to have Flexo-Graphics join the Inovar family,' said Jeff Brezek, executive chairman of Inovar Packaging. 'For more than two decades, Tim and Mike McDonough have built a highly innovative consumer and industrial label business with a very strong customer-focused culture. They are a great addition to the Inovar platform.'

The owners of Flexo-Graphics, Tim McDonough and Mike McDonough, will partner with the current Inovar management team and will continue leading the Midwest platform.

Xeikon signs North America agent

Xeikon America and Anderson & Vreeland have entered into a definitive agreement under which the latter will sell the Xeikon line of dry toner and inkjet-based digital label presses in the United States and Canada.

IJJ doubles manufacturing base

Industrial Inkjet Ltd (IJJ) has doubled the size of its manufacturing base at its Cambridgeshire headquarters. An independently-owned manufacturer of industrial inkjet technology, IJJ is also the official sales and technical support center for Konica Minolta inkjet printheads outside Asia, providing advice on all inkjet technology in industrial applications. The company celebrates its 15th anniversary next year.

Inglese becomes Amica Systems' distributor

Italian plates distributor Inglese has signed a new partnership agreement with Dutch inkjet specialist Amica Systems Europe for resale of its portfolio on the Italian label market.

'Amica System products and their integrability with Refine Finishing lines could be a very good opportunity to expand our business in the label field. Our long history and very good knowledge of Italian label printers could be profitable for Amica Systems, creating opportunity for win-win cooperation. We look forward to improve our business together,' said Marcello Morara, sales director of Inglese.

ABG appoints distributor for Chile and Bolivia

AB Graphic has appointed Santiago-based Ferrostaal Graphics as its new distributor for digital finishing lines in Chile and Bolivia. The move follows Ferrostaal's acquisition of AB Graphic's former distributor, Imagex.

'Chile is a great market for AB Graphic, with a strong focus on high end label finishing. We look forward to enjoying the mutual success this relationship will bring,' said Tony Bell, AB Graphic's sales director.

MPS signs new agents

MPS has appointed new two new agents, B+K Kft in Hungary and Macron Systems in Czech Republic, who will now offer its flexo, offset and hybrid press systems in eastern Europe.

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News



Xitron is one of Global Graphics Software's longest-standing partners

Global Graphics acquires Xitron

Xitron develops workflow systems and interfaces

Global Graphics has acquired Xitron, a pre-press software company headquartered in Ann Arbor, Michigan, USA. Xitron develops workflow systems and interfaces to drive the pre-press industry's most popular output devices. One of Global Graphics Software's longest-standing partners, it has been building systems around the Harlequin RIP since 1991 to drive hundreds of different models of imagesetters, proofers, platesetters, inkjet printers and digital presses.

With customers around the world, including North and South America, China and Japan, the Harlequin-based Xitron Navigator RIP enjoys an international reputation. In recent years Xitron has been steadily increasing its footprint in production inkjet with its Navigator driven digital front end (DFE) which supports drive electronics from Meteor Inkjet and Global Inkjet Systems and drive all Memjet and Canon Finetech heads directly.

Gary Fry, CEO of Global Graphics, said: 'Xitron is the lead player in pre-press RIPs with some 35,000 Harlequin RIP-based installations around the world and an impressive network of dealers and distributors. This acquisition allows us to further develop our digital print strategy with a more complete offering for industrial inkjet, such as textiles and décor, and with a broader range of pre-press components for digital applications.'

Karen Crews, president of Xitron, commented: 'Having developed pre-press software solutions around the Harlequin RIP for nearly 30 years, Xitron is looking forward to the collaboration and growth opportunities associated with this change. As we continue to expand beyond our well-established presence in offset, flexography, screen printing, and high-speed inkjet, we're excited to be a key part of Global Graphics' strategic initiatives.'

Consideration for the acquisition is 4.5 million USD in cash. For the year ended 31 December 2018 Xitron recorded revenue of 4.77 million and EBITDA of 0.47 million and for the six months to 30 June 2019 revenue of 2.43 million and EBITDA of 0.32 million.



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News



Parkside is a manufacturer of compostable packaging

Parkside partners with Stratus Packaging

British flexible packaging specialist Parkside has partnered with French label specialist Stratus Packaging to develop a business based on short runs of compostable films.

Stratus is a manufacturer and distributor of packaging, adhesive labels, labels for IML, and shrink sleeves for food and beverage, health and beauty, industrial and chemical markets. According to the agreement, both companies will work together on all small runs of compostable packaging. Additionally, Status will be a sole manufacturer and distributor of Parkside products in France and Switzerland.

'Parkside is one of the leading manufacturers of compostable packaging in Europe, so it is with pride that we are launching this new collaboration. This partnership will allow us to approach the flexible packaging market in France and Switzerland with a niche product, and we are extremely excited about this new relationship. This is the right time and place to be able to offer such a product on the market when customers are so environmentally conscious,' said François Xavier Allilaire, sales and marketing director at Stratus.


Domino appoints South America distributor


Domino has appointed Grafisoft as a distributor of its N610i inkjet press and K600i monochrome printers throughout Chile, Colombia, Ecuador and Peru. Founded in 2000, Grafisoft has headquarters in Chile and offices in Colombia, Ecuador, Peru and Argentina.

BST eltromat and SeeOne partner

BST eltromat has partnered with an Italian manufacturer of surface inspection systems, SeeOne Vision Technology, following several years of close cooperation aimed at optimizing production processes.

The Italian branch of BST eltromat, a full subsidiary of the BST Group, has been already working with SeeOne for several years on the development of special surface inspection requirements. The cooperation has now resulted in a formal partnership agreement.





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New Products



01 Surfas adhesive technology Avery Dennison

The new Surfas adhesive technology is designed to create a stronger hold on rough finishes such as corrugated boxes. Surfas will have its main applications in e-commerce and logistics labeling, reducing the risk of curled or failed logistics labels. It will be available at the same price as conventional labeling for corrugated board. Corrugated cardboard can be a challenge for label adhesion, according to Eric Ide, senior product manager, Label and Packaging Materials Europe. 'Irregular surfaces require a more rigorous label adhesive that can bond to a wider variety of finishes. Surfas Technology is developed for ultimate strength and bond when labeling rough substrates. In addition to streamlining operations, increasing reliability and improving accuracy, the new adhesive coating technology offers sustainability advantages by using significantly less oil per square meter of material.'

02 Trojan Label T5 AstroNova

TrojanLabel T5 is a larger version of the company's TrojanLabel T4 digital label press and finishing system with additional UV flexo varnish capabilities. The TrojanLabel T5 is built on AstroNova's TrojanLabel T3 inkjet label press platform integrated with a smart, compact converter unit featuring UV flexo varnish, lamination, rotary die-cutting, slitting and waste removal. Following the introduction of the T4 two years ago, the T5 is the company's latest high-production label printing and converting system for the professional printing market. The T5 adds several additional enhancements such as spot and Supergloss varnish, lamination, slit and rewind, and cold foil application for silver, gold, and metallic decorative accents, all in a single compact platform.

03 Hermanature fieno Herma

Herma has unveiled Hermanature fieno (340), an allergen-free label material based on grass paper featuring a low-migration adhesive, reduced CO2 footprint and 'excellent printability'. Sun-dried hay is a major component. Processing these fibers for paper production generates little CO2 compared with paper produced from fresh fiber or even recycled cellulose. The new label material contains 30 percent grass and can be processed like conventional paper, offering good printability in offset and flexo printing. It contains no allergens that are subject to EU labeling requirements listed in the regulation (EU) 1169/2011. In order to maintain this advantage, Hermanature fieno is coupled with the 62A adhesive which is suitable for direct contact with dry and moist and fatty foodstuffs with a correction factor of three or more according to the regulation (EU) 10/2011.

04 Sigma solvent ink Kao Collins

Kao Collins has launched Sigma, a solvent ink for HP 45si thermal inkjet technology to reduce the wiping and purging of nozzles. According to the company, Sigma achieves fast curing without external heat sources and increases decap to at least four times that of other inks currently available on the market. The aggressive solvent dries quickly on plastics, while Sigma offers much better decap properties. The lab testing also confirmed Sigma's shelf life for individual cartridges of at least 12 months. With further testing chemists at Kao Collins expect results showing an even longer shelf life in the future. Sigma is ideal for mailing and addressing industries along with packaging converters. The ink adheres to more substrates, including films such as BOPP, PE, PET and PP, foils, a variety of label materials, some metals, and many other non-porous materials.

New Products

05



07



06



08



05 Strata BOPP film Innovia Films

Innovia Films and the German snack manufacturer Wildcorn have worked together to produce a fully recyclable and sustainable pack for its organic popcorn range. The joint project to establish a new sustainable packaging standard began soon after the launch of Innovia's Propafilm Strata high barrier film which achieved the 'Made for Recycling' logo from Interseroh, a German recycling and consulting company. Innovia used a lamination of Propafilm Strata, and a white cavitated OPP. This construction was also tested by Interseroh and confirmed as fully recyclable. Propafilm Strata provides a barrier to aroma, mineral oils and oxygen even at high relative humidity levels, enabling increased shelf life and reduced food waste. It is glossy, is food contact compliant and chlorine-free. The film is suitable for use in a range of markets, is printable and offers a wide seal and hot tack range.

06 AF500 Fix-a-Form

British manufacturer Fix-a-Form International has launched its next generation Autofix leaflet label finishing machine, AF500, the first of which is already sold and in production. The AF500 is the latest leaflet label finishing machine designed especially for multi-page label production. The next generation in the Autofix range is claimed to feature faster set-up times, easier operation and a web width up to 500mm (19.5in). It provides increased productivity and greater range of formats often demanded by the pharmaceutical, agro-chemical, promotional and informational markets.

07 DTM FX810e foil imprinter DTM Print

The new DTM FX810e foil imprinter for finishing and highlighting product labels with a width of up to 8in is designed specifically for heavy-duty jobs. It adds brilliant shiny metallic

or laminated highlights both to blank or already pre-printed labels, whether they have been produced by inkjet, laser, LED, offset or flexo printing. It features a metal housing, an intuitive color touchscreen and can be connected via USB 2.0 and Ethernet 10/100. Its maximum print speed is 101.6mm (4in) per second and it uses DTM Print certified thermal transfer ribbons with a maximum width of 220mm. With the optional built-on guillotine cutter the printer can horizontally cut continuously or die-cut and reflective labelstock. This enables cutting down large rolls of pre-printed labels into label stacks.

08 Publisher package update Chili Publish

Software specialist Chili Publish has unveiled the latest label and packaging update for its publisher package, which now includes new barcode generator, a mixed ink option and a step

feature in the PDF generator that optimizes workflow. The new barcode generator now supports GS1-compliant codes and can design and manipulate pharma 1 bar Laetus codes connecting them directly to PIM systems for product tracking and tracing.

ColorServer

GMG

GMG has released a new version of its ColorServer software featuring new options for the packaging segment, including adjustments in printing conditions which are now handled automatically. The latest release enables a direct connection to the GMG's color profiling tool, OpenColor. Existing profiles can now be used in ColorServer, including custom CMYK profiles and spot color conversions.



For more new products, go to www.labelsandlabeling.com/news/new-products

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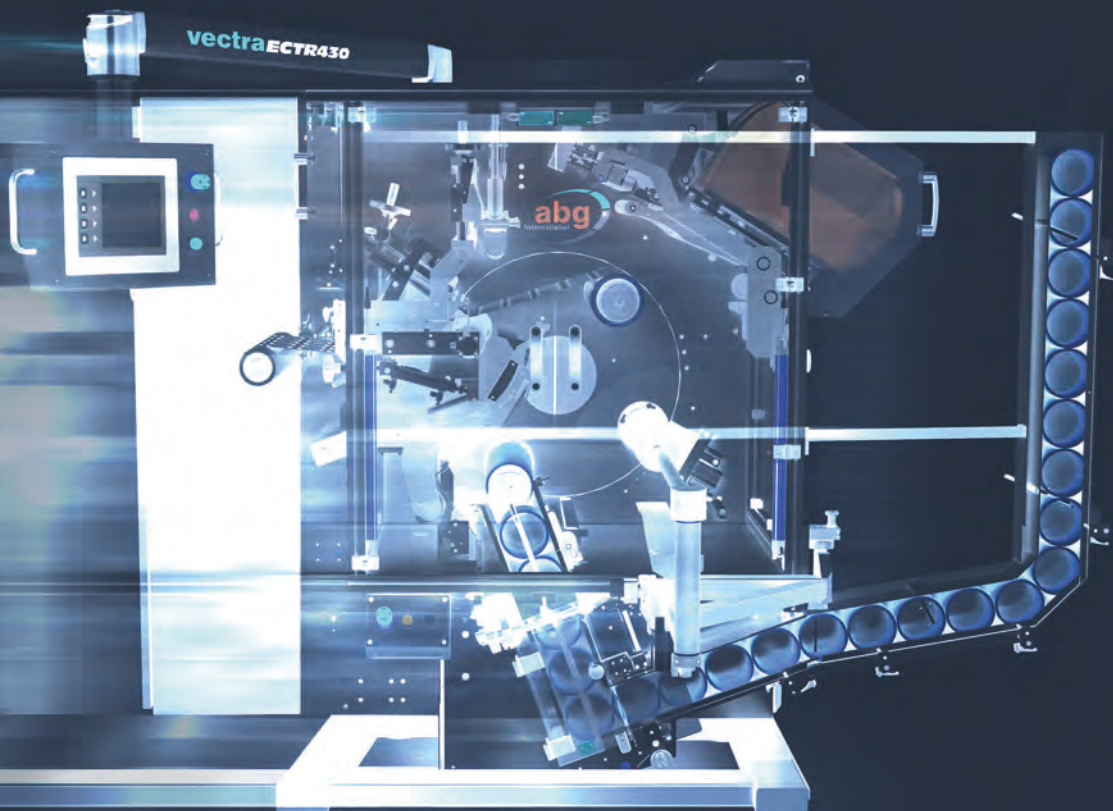


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Installations

01



02



03



04

01 24 HP Indigo 20000 presses ePac, USA

ePac, the all-HP Indigo digital flexible packaging converter, will roll out a new wave of HP Indigo 20000 digital presses in 2020 to continue disruption of the global flexible packaging market. A new incremental order of 24 HP Indigo 20000 presses is the largest packaging deal to date for HP. This nearly doubles production capacity for ePac, to expand within the next year from 28 presses in 12 locations to over 52 operating at 20 sites – including new locations opened in Canada and the UK. The investment is valued at over 100 million USD, including hardware, supplies and services over several years.

02 Gallus Labelmaster Interfas, France

Gallus, a subsidiary of Heidelberg, celebrated a milestone at Labelexpo Europe 2019: the 100th sale of the Gallus Labelmaster press, ordered by Interfas, based in Louviers,

France. The conventional press with a printing width of 440mm is equipped with eight flexo and three die-cutting units. Cold foil finishing is integrated, too. It is the first Gallus Labelmaster and the first flexo press for Interfas, which has previously relied exclusively offset printing for label production. The press is expected to be installed at Interfas in spring 2020. With 100 machines sold since its launch at Labelexpo Europe 2017, the Labelmaster is Gallus' most successful press launch.

03 Mark Andy P9E Berkshire Labels, UK

Berkshire Labels, a UK-based label and shrink sleeve converter, has installed Europe's first 17in (430mm) Mark Andy Performance Series P9E at its manufacturing facility in Hungerford. The P9E is the latest model in Mark Andy's range of Performance Series flexo presses and is designed for specialist film applications as well as traditional

label converting. It joins a 17in Mark Andy P7 installed in 2017 and three other 13in Mark Andy presses at Berkshire Labels. Berkshire Labels' new P9E is a highly specified model, featuring eight UV flexo print stations, corona treatment and web cleaning, delam/relam, a crossover facility for peel/reseal, and the full 'Filmic Pack', which includes chilled impression drums and lightweight tension control. It also has Mark Andy's QCDC unit and the web advance waste rewind, known as 'Snowball'.

04 Two Nilpeter FA-17s Geostick Group, Netherlands

Dutch converter Geostick Group has added two additional Nilpeter 17in FA presses to a line-up of seven Nilpeter presses in the company's three production plants in Utihoorn, Heumen and The Hague. The two new presses have been installed in The Hague plant. 'With these modern printing presses we are

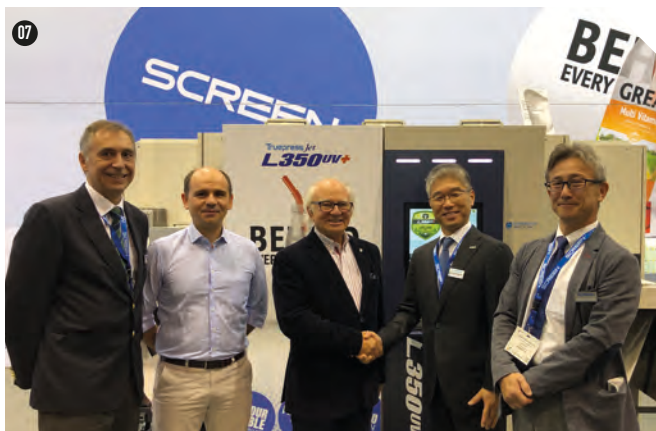
more ready to cope with the increasing demand for short delivery times and high printing quality in mid-length runs. The business is still growing, and with the added efficiency provided by our two new FA presses, we have won even more food production customers,' said Cees Shouten, operations director at Geostick Group.

MacDermid plate processing system

Telrol, Netherlands

Dutch converter Telrol purchased MacDermid's new Lava NW-M thermal plate processing unit at Labelexpo Europe, to improve sustainability and move towards solvent-free production. The thermal processor was on display at Labelexpo Europe in Brussels. Lava NW-M system features a small footprint, reducing platemaking space and enables creating press-ready plates in less than an hour and eliminates the need for solvents.

Installations



05 S-OneLP CatPack eBeam Gopak, USA

S-One Labels & Packaging has installed its first CatPak eBeam finishing system at Gopak in Delafield, Wisconsin. This new equipment allows Gopak to provide fast and clean eBeam finishing for digitally printed flexible packaging. AJ Buran, president of Gopak, said: 'The CatPak, with its e-beam curing technology, is far superior to traditional methods of finishing, eliminating costly lamination and allowing us to offer our customers faster turnaround and more innovative solutions, especially when it comes to sustainable solutions, such as recyclable and compostable pouches and films.' The CatPak system combines an eBeam curing system for 30in flexible packaging film, a corona treater and 30in web unwind and rewind modules, integrated into the eBeam curing system base frame. It takes up less than 300sq ft.

06 Focus Label Machinery DFlex The Label Centre, UK

The Label Centre has invested in DFlex digital hybrid press from Focus Label Machinery to increase quality, capacity and introduce in-line finishing. The Label Centre is best known for short run work, servicing the durable industrial label industry. The company opted for a 9in (250mm) width, with inkjet white as well as CMYK. 'It became clear the market was changing,' said Derry Bryan, MD of The Label Centre. 'Not only were runs getting shorter, we were being asked to produce more complex artwork. There is a base of work we can migrate over from our flexo press. Most of the jobs, however, will be new work as this investment opens up a wide range of opportunities.'

07 Screen Truepress Jet L350UV Etimur, Portugal

Portuguese label converter Etimur has invested in a

Truepress Jet L350UV+LM to improve print color accuracy and repeatability at higher speeds. This installation has also marked a milestone for Screen as it became 150th purchase of this press. Etimur is a family-owned converting business with nearly 30 years of experience operating in the industrial label market and servicing customers worldwide. According to the company the new press helped to increase color accuracy, enabled high ink resistance and repeatability at above par speeds.

08 Xeikon CX500 Accu-Label, USA

US converter Accu-Label, based in Fort Wayne, Indiana, has installed a Xeikon CX500 digital press. The machine was delivered following its US debut at the Printing United trade show. The CX500 is a dry toner, roll-to-roll, 5-color digital label press driven by Xeikon's digital X-800 front end. This Xeikon 'Cheetah' has a

web width of up to 20 inches and a full rotary printing speed of 98 feet per minute at 1200 DPI.

JM Heaford FTS plate mounters Multiple companies

JM Heaford received a record number of orders during Labelexpo Europe 2019, which led to the sale of nine flexographic plate mounters with the Heaford FTS proving to be the most popular choice. In total, seven FTS mounters were ordered at or immediately after Labelexpo. Heaford FTS models are scheduled for first ever installations in Morocco and Turkey, while an existing customer in Russia chose to install two additional machines. For Penta Adhesiv of Portugal the choice of a new Heaford FTS 700 mounter was a vote of confidence in a trusted supplier. Among the eight companies who chose to order Heaford products three are first-time customers. One of which, Bóna Labels of Nové Zámky, chose to order Slovakia's first ever EES plate mounter.

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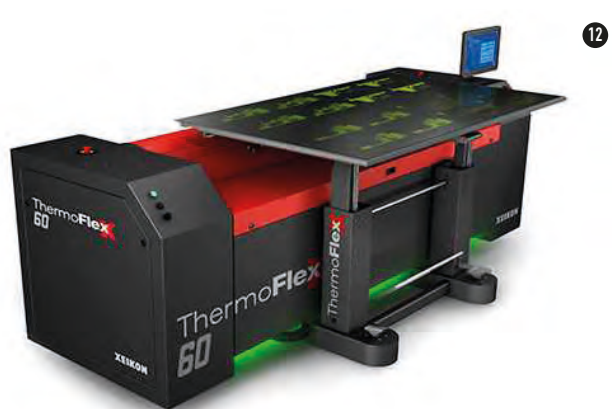
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Installations



09 MPS EB 370

Paramount Labels & Tags, UK

Paramount Labels & Tags has installed its first 8-color MPS EB 370 flexo press with a further plan to invest into two more presses by 2020 with the aim to provide faster service and maximize return for its customers. 'MPS were very helpful in identifying ancillary equipment that we would need and were a constant source of information when we needed any help. When we first embarked on this project, we set a budget that we really didn't want to go beyond. MPS were instrumental in making sure that the project respected this and did all they could to ensure that we got the best possible deal throughout the entire process,' said Phil Wright, managing director at Paramount.

10 Weigang offset press

Cograf, Italy

Italian label converter Cograf ordered its first Weigang offset

press at Labelexpo Europe 2019 to reinforce its productivity and enlarge wine label offering. The Weigang offset press was transported to Cograf after the show and is already working at its plant near Turin. 'Weigang offset machine has in-line semi-rotary hot stamping, flatbed hot stamping and embossing and flat screen. It's a perfect machine for high quality wine labels in one process,' said Roberto Cotterchio, president of Cograf.

11 Martin Automatic unwind/splice and rewind units

Kolbe-Coloco Spezialdruck, Germany

German converter Kolbe-Coloco Spezialdruck has fitted Martin Automatic non-stop unwind/splice and rewind units to its two Gallus RCS 430 narrow web combination presses to reduce waste and boost productivity. The company, now part of the Hamburg based HO Persiehl Group, supplies self-adhesive labels for spices, smoothies, and

meat for food and beverage producers in the Netherlands, France, and Switzerland. While relatively new to narrow web production, the company's history dates back to 1828 in bookbinding. According to the company, operators made around 3,400 roll changes a year on each Gallus machine, and the time-savings now achieved with the Martin technology are 'impressive'.

12 Xeikon ThermoFlexX 60D

Mediahaus, Germany

German multimedia company Mediahaus has installed ThermoFlexX 60D from Xeikon to increase its imaging capacity. 'The productivity of the dual head ThermoFlexX 60D was very attractive with its speed of up to 12sqm/hr but it's the flexibility that really impressed us the most. It fits in easily to our Esko workflow and works with TIFF or LEN files of multiple resolutions. Automatic loading and unloading, with a vacuum

slider for partial plates all make the system easier to use, helping our efficiency and reducing plate waste,' commented Michael Merckens, technical manager for packaging at Mediahaus.

Flint Group nyloflex Express

Flexo Digital, Honduras

Flexo Digital has invested in a full nyloflex Xpress thermal processing system from Flint Group. It wanted to supply its customers with high-quality, consistent printing results and greater efficiency in its pre-press workflow and plate production, while managing costs and environmental responsibilities. The company decided to invest in nyloflex FIV Xpress thermal processing system, a combi FIII exposure/light finisher and a ThermoFlexX 48 imager – all from Flint Group.



For more installations, go to www.labelsandlabeling.com/news/installations



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Trevor Smith, Managing Director,
Amberley Adhesive Labels.



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TECHNOLOGY



INTEGRITY



FLEXIBILITY



COLLABORATE

Appointments



Robyn Buma
Vice president of global procurement
Avery Dennison
Buma is promoted to VP of global procurement for the company's Label and Graphic Materials and Industrial and Healthcare Materials segments. She has more than 19 years' experience with Avery Dennison, serving most recently as senior director, procurement global categories and head of procurement for the European region, based in the Netherlands. She will be based in Mentor, Ohio.



John Peat
Managing partner and managing director
ePac UK
The appointment has been announced ahead of the opening of the company's first European production site in the UK. With over 30 years of experience working in the healthcare, home and personal care, and beverage label markets, Peat brings technical expertise and extensive industry knowledge to the role.



Nicolas Ahlburg
Chief technical officer
Vetaphone
Ahlburg will focus on corona and plasma surface treatment technologies and customer service. He brings extensive experience in the technical and service field from previous positions at Nortec, where he was a business development engineer and went on to become a Master of Science (MSc) specializing in technology-based business development.



Martin Sonnenschein
Chairman
Heidelberg
Martin Sonnenschein has been elected as a new chairman of the supervisory board at Heidelberg, replacing Siegfried Jaschinski who steps down for personal reasons after 12 years of service. The newly elected chairman, currently partner and managing director of the management consultancy A.T. Kearney, joined Heidelberg on December 1, 2019.



Robert Buongiorno
President
BST North America
Buongiorno has worked in the press manufacturing industry for almost 40 years, and brings extensive experience in sales, service, business development and leadership. He succeeds Mark Lambrecht.

Change of board
Siegwerk
Siegwerk has restructured business responsibilities among its management board. Herbert Forker, CEO and former president Canada, USA and Latin America at Siegwerk, has taken over responsibility for India, China and Southeast Asia from Ralf Hildenbrand, who in return has assumed responsibility for the Americas from Herbert Forker.



Fabian Prudhomme
Vice president of sales and alliances
Chili Publish
Prudhomme has worked at renowned packaging, retail and graphic arts companies such as Colruyt Group, Enfocuss, Esko, and Kodak.



Francesco Dattilo
CEO
PrintabLED
Dattilo has more than 20 years of experience in executive and non-executive positions in international corporations. He has joined PrintabLED with the aim of giving the team a defined structure and positioning the company as a leader in the UV LED lamp market in Europe.



Duncan Sargeant
UK and Ireland sales manager
Edale
Sargeant joins the Edale team with over 22 years of experience, including the 13 years selling digital presses and the following nine years focusing on the label and packaging market. He will focus on the UK and Ireland by expanding support to Edale's growing list of customers and promoting the recently launched FL3 flexo press.

Shane Bertsch
VP of strategic planning
INX International
Bertsch joins INX after spending the last 13 years at Havi.



Angel Jackson
Marketing and event coordinator
Harper Corporation
Jackson is responsible for coordinating trade show events such as Harper road shows and managing all social media channels. In addition, she creates marketing materials for Harper anilox rolls, HarperScientific Press Room products, and Harper GraphicSolutions technical services as well as advertisements for various industry trade publications.



Thomas Beyer
Vice president of APAC
NiceLabel
Beyer will focus on further enforcing the company's customer and partner support. He founded NiceLabel's operations in Germany and has been a vital member of the NiceLabel international leadership team since 2008. In his recent capacity as VP of EMEA sales, he structured and developed NiceLabel's sales division.



For more appointments, go to labelsandlabeling.com/news/appointments

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keep reinventing

L9 announces World Label Awards winners

Tony White, chairman of the judging panel, summarizes the results of the 2018 WLA competition

Being chairman of the WLA judging panel is like sitting on top of the label world from a technical point of view. One is privileged to witness the best labels submitted from the worldwide L9 member associations.

As the level of quality improves year on year, we often deliberate long and hard in making the decision as to which labels will earn the honor of being selected as a category winner followed closely by the Honorable Mention awards. From the winners of each category group the judges will select, after further deliberation, the five Best of the Best awards.

The minutest detail can affect the judges' decision which often follows a rigorous technical debate about the merits and demerits of an entry. It is important that all entries are supported by detailed technical information relating to factors such as type of press, speed of printing and the substrate used, so that an informed decision can be made.

The recipients of the WLA awards are justifiably proud of their achievements, especially the Best of the Best awards which were presented during Labelexpo Europe 2019 in Brussels.



The Best of the Best awards were presented at Labelexpo Europe 2019

Best of the Best

Turn the page to see the Best of the Best labels, plus a selection of Tony White's other favourites.

Winners and Honorable Mentions:

Class 1: Flexo Line

Winner: TLMI: McDowell Label & Screen Printing, USA, for 'Braising Sauce'

Honorable Mention: FPLMA: Labelhouse Australia for 'Daylesford and Hepburn Mineral Springs Co. Sparkling Mineral Water 750ml'

Class 2: Flexo Line/Screen

Winner: FINAT: Kimoha Entrepreneurs, UAE, for 'Active CVT'

HM: JFLP: Yukousha, Japan, for 'Princess Veil Label'

Class 3: Flexo Color Process

Winner: TLMI: Labeltronix, USA, for 'California Love'

Class 4: Flexo Wine/Spirits

Winner: TLMI: Multi-Color North America Wine & Spirits, USA, for 'Freakshow Zinfandel'

HM: FPLMA: Labelhouse, Australia, for 'Pietro Gallo Estate Grappa di Prosecco'

Class 7: Letterpress Color Process

Winner: JFLP: Hokkai Sealing, Japan, for 'Hokkaido 150 Label'

Class 8: Wine/Spirits

Winner: JFLP: Shimokuni, Japan, for 'Kunimaro Sake'

Class 10: Offset Line/Screen

Joint Winners: FINAT: Marzek Etiketten + Packaging, Austria, for 'Sir/Lady Burgenland'

FPLMA: Labelhouse, Australia, for 'Alpine Cider Pink Lady Dry 330ml'

Class 11: Offset Color Process

Winner: JFLP: Maruki Printing, Japan, for 'Japanese Sweet Label'

Class 12: Offset Wine/Spirits

Winner: FINAT: Multi-Color North America Wines & Spirits, USA, for 'Borne of Fire'

HM: TLMI: Multi-Color North America Wines & Spirits, USA, for 'Sidewinder Spirits Co'

Class 13: Combination Line

Winner: PELAC: Guangdong Kinde Technology, China, for '06 02 Year'

HM: TLMI: McDowell Label & Screen Printing, USA, for 'Wreckage'

Class 14: Combination Line/Screen

Joint Winners: TLMI: McDowell Label & Screen Printing, USA, for 'Burner'

FINAT: Germark, Spain, for 'Mask Shikiso Color & Highlights Protection UV Rays'

Class 15: Combination Color Process

Winner: JFLP: Takara Pac, Japan, for 'Rose'

HM: TLMI: Multi-Color, Mexico, for 'Caprice'

Class 16: Combination Wine/Spirits

Winner: FINAT: Multi-Color North America Wine & Spirits, USA, for 'The Countess Walewska Vodka'

HM: JFLP: Kyoto Seal Label Corporation, Japan, for 'Edo Kauo Sake Label'

Class 17: Digital Printing

Joint Winners: FPLMA: Multi-Color, Australia, for '1L Misto EV Olive Oil'

SALMA: Rapid Labels, New Zealand, for 'New Zealand Honey'

HM: FINAT: Azimut NPC NT, Russia, for 'Spaquatoria Milk Dew'

Class 18: Digital Wine/Spirits

Winner: TLMI: Syracuse Label & Surround Printing, USA, for 'Drawbridge Gin'

HM: JFLP: Takara Pac, Japan, for 'Sakura Sake Label'

Class 19: Screen Printing

Winner: TLMI: McDowell Label & Screen Printing, USA, for 'Pure Brazilian'

HM: JFLP: Sibel Industry, Japan, for 'Sumo Label'

Class 20: Gravure

Winner: SALMA: Gravure Packaging, New Zealand, for 'KiwiFarmNZ Green Kiwifruit Juice'

Class 21: Booklets

Winner: TLMI: Yerecic Label, USA, for 'Campari Chef Inspired'

Class 22: Innovation

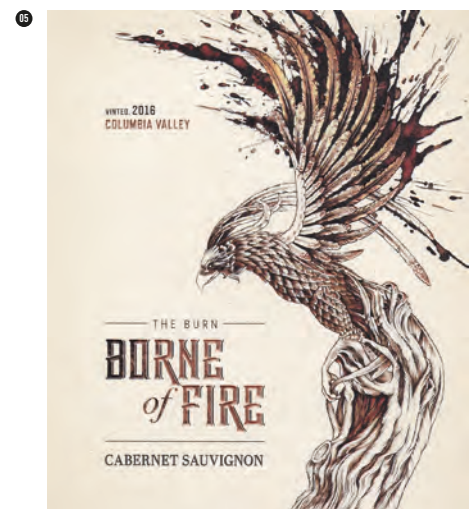
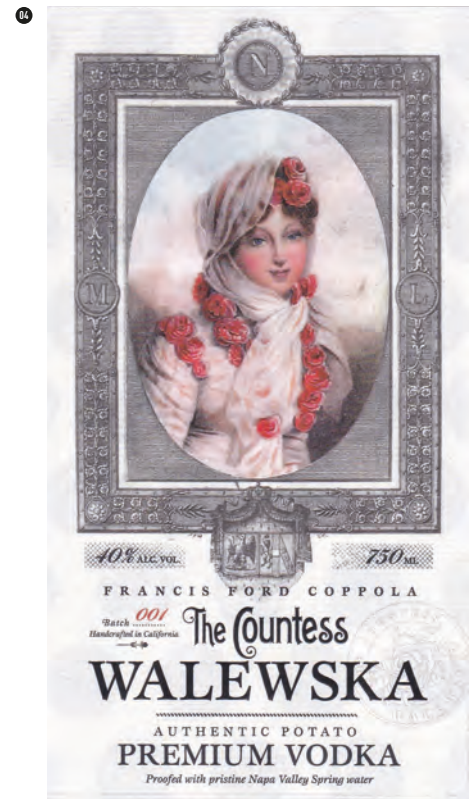
Winner: FINAT: Schreiner Group, Germany, for 'Color Laser Film With a Fingerprint'

HM: PELAC: Tungkong, China, for 'Xiao'er Fengqing Mixture'



For more information go to www.worldlabelawardsassociation.com

Label & packaging showcase



WLA Best of the Best winners

01 TLMI

Flexographic Printing
Labeltronix, USA
California Love

02 TLMI

Digital Printing
Syracuse Label & Surround
Printing, USA
Drawbridge Gin

03 JFLP

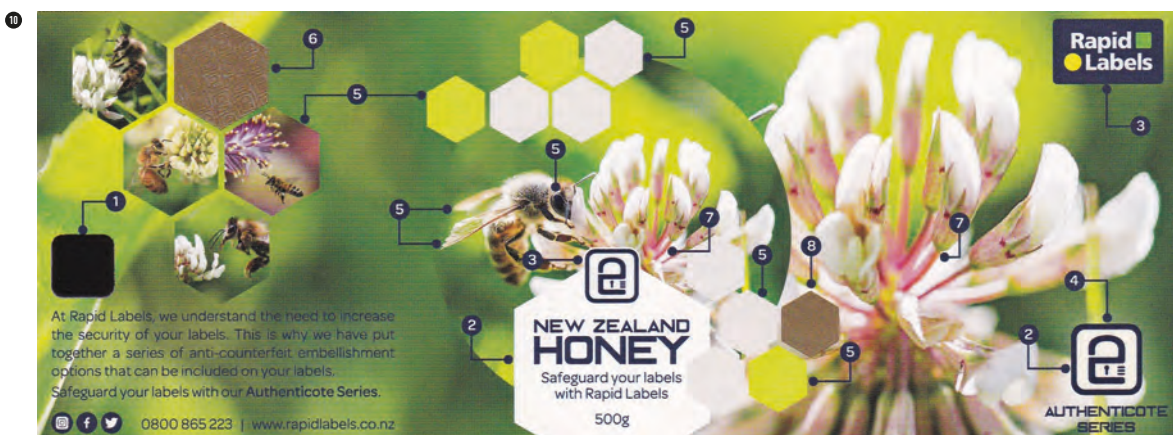
Letterpress Printing
Shimokuni
Kunimaro Sake

04 FINAT

Combination Printing
Multi-Color North America
Wines & Spirits
The Countess Walewska Vodka

05 FINAT

Offset Litho Printing
Multi-Color North America
Wines & Spirits
Borne of Fire



Tony White's selection of other winners

06 TLMi

Flexo Wine/Spirits
Multi-Color North America
Wine & Spirits
Freakshow Zinfandel

07 FINAT

Offset Line/Screen (joint winner)
Marzek Etiketten + Packaging
Sir/Lady Burgenland

08 FPLMA

Offset Line/Screen (joint winner)
Labelhouse
Alpine Cider Pink Lady
Dry 330ml

09 JFLP

Offset Color Process
Maruki Printing
Japanese Sweet Label

10 SALMA

Digital Printing (joint winner)
Rapid Labels
New Zealand Honey

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The Mike Fairley column

An adaptable and still-growing industry

With growth slowing in developed markets, where can the label industry look to for future growth?

The label industry has undergone a quite dramatic change in recent years, becoming ever more global in its operations – whether it's the materials or technology suppliers, or the major label converters. Following new global opportunities, new markets and GDP growth countries and regions has enabled the label industry to continue to achieve global growth of around 4 to 6 percent: something it has been able to achieve for a great many years.

Not all countries and markets have been able to benefit from this evolving global label growth. Most western European countries and the United States are forecast to drop to 1 to 2 percent GDP growth per annum over the next five years. Even that may be optimistic, as the EU has recently downgraded its forward growth forecasts for the main European economies to little more than 1 percent or less, while eastern Europe, which has fared much better over the past 10 to 15 years, appears to be looking at forward growth of only 2 to 3 percent.

There seems little doubt that trading conditions for many label converters in western European countries and in North America over the next few years will not be easy. Pressures on brands and retailers to reduce packaging, cut back on the use of plastics and look at new ways of marketing and selling more environmentally friendly produce (possibly without labels) will bring new challenges for many in the world of labels. Ongoing political instability in Europe and between China and the United States doesn't help either.

Fortunately, while the developed world economies have slowed, new global markets for labels have emerged, leading the major labelstock and press technology suppliers to establish manufacturing facilities outside of their traditional key homes in North America and western Europe. In short, the label industry today is a totally global business which tends to follow the global brands as they expand into emerging countries and new markets.

Emerging markets

So where are the ongoing and new label markets of tomorrow? Study of GDP growth forecasts by country/region over the next five years make for interesting reading. Six out of the forecast top ten growth markets by 2024 are all in Africa, with Ghana, South Sudan, Rwanda and Ethiopia all expected to achieve GDP growth rates of 8 or 9 percent in 2019. Senegal in excess of 10 percent. Countries such as Uganda, Kenya and Egypt in turn are all looking at growth of around 6 percent. Building a sophisticated label industry in all these countries will create its own challenges and undoubtedly take time.

Also in the higher top ten to twenty GDP growth markets over the next five years are many of the key Asian countries: India

and Bangladesh, Philippines and Vietnam with forecast growth of around 7 percent, Indonesia and China slightly lower at just over 5 percent, and Malaysia at just under 5 percent – but all still considered as good growth markets. Some of the big label converter groups have already established plants in some of these countries and regions. Looking ahead, India is expected to become the world's leading economy within a few years, followed by China.

Perhaps one of the key challenges for the traditional label technology suppliers is that China and India are now fast developing their own label technology and increasingly competing against western manufacturers in their home countries, and already having a substantial presence at Labelexpo Europe. China has also been investing substantially in Africa and will likely see the region as a natural territory to expand their label technology and businesses.

As for Latin America, activity slowed in a number of key countries in the early part of 2019, notably in Brazil, Mexico, Argentina and Chile, but with modest recoveries expected in most of these for 2020. Trade and technology tensions between the United States and Mexico have not helped that country's label industry.

So what can we say about the overall outlook for the global label industry? Does it still have a good future? What kind of overall growth can be expected up to 2024?

IMF forecasts for the year ahead point to a weaker than anticipated global activity investment, and demand for consumer durables is expected to be subdued. Projections for 2020 therefore show global growth at just 3.5 percent. Having said that, the label industry has largely grown at between 1 or 2 percent above GDP worldwide for many years, so the long term label industry trend of global growth of somewhere between 4 and 6 percent still seems achievable. But that is likely to be largely attained in the world's biggest growth markets in Asia and Africa.

The developed label markets of Europe and North America will undoubtedly have their own challenges to remain competitive, with investment particularly targeted at efficiency, productivity, workflow automation, waste reduction and environmental performance. The industry has had its challenges before, but it is probably the most adaptable and technology sophisticated of all the print sectors. It may become more streamlined, more automated and more environmentally conscious – but will undoubtedly survive and continue to grow.



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Sustainability, responsibility and profitability in print

It's possible to achieve all three, writes L&L's branding and design columnist Vicki Strull

If you're shopping for a product and deciding among several choices, would you pay more for a brand that is environmentally responsible? A recent Nielsen study found that 50 percent of Baby Boomers, 75 percent of GenZ, and 73 percent of Millennials would. What does this mean to brands and the printers that support them? If you're not supporting sustainability, you may be losing customers.

"If you are not supporting sustainability, you may be losing customers"

Many brands are getting the message, employing sustainability goals and timelines – Coke, Unilever, Mondelez, Nike, Amazon, L'Oréal and Burger King, to name a few. Still, with the increase in online shopping, we're seeing an increase in shipping packaging, too. Years ago, we only saw a product's primary packaging as we plucked it from a store shelf. With e-commerce, we receive secondary packaging and sometimes even tertiary packaging.

The brand owners and packaging companies that I work with have a deep desire to be environmentally responsible and have loyal consumers. Here are few of the top sustainability strategies I recommend:

Restructure packaging. Restructuring means designing packaging to fit the item. It's an investment in packaging design that has an ROI domino effect. You're purchasing less material, saving costs on the front end. Smaller packaging means more cases fit on a pallet, reducing transport costs. Shipping more products in fewer containers reduces your carbon footprint. When consumers open the designed-to-fit packaging, they perceive your brand as a steward of the environment. And they'll let you know how happy that makes them with pictures and shout outs on Instagram.

Become a lightweight. Lightweighting is purposefully choosing lighter-weight paperboard that has the same caliper as

your packaging requires, in order to reduce your package or product weight.

Much like restructuring, selecting lighter weight materials can have far-reaching benefits, such as reducing transportation and fuel costs.

Reuse or upcycle. When my daughter was little and we were furnishing our home, the empty furniture boxes became her fort and playhouse. Retailers and brand owners know that kids love boxes, and today we're seeing some wonderful innovations.

For example, Target has designed boxes that are printed with its brand puppy, Bullseye, doing things like driving a truck. Social media lit up with kids playing with the boxes. Recently, Amazon applied for several patents for its corrugated boxes where pieces pop out to become a sword, a house and a rocket ship.

Recycle. This is a huge category that includes using recycled or recyclable materials. We're all familiar with the plastic straw versus paper straw conversation. There are plenty of other plastic products that are having a huge impact on our landfills.

Case in point: the millions of plastic cards that are produced each year as gift cards, frequent-buyer cards and credit cards. If producers created these cards from biodegradable fiberboard instead, what would that mean to our environment? Sappi, a provider of sustainable paperboard products, is one company dedicated to making that change real. We're beginning to see paperboard replace other materials – paperboard beer bottles, the first shower-safe fiberboard bottles, and paperboard game pieces in board games.

In addition to using more recycled materials, brands are also using the How To Recycle label to specify for consumers which parts of a package are recyclable and how best to recycle it. Which brings us to...

Dispose responsibly. If packaging is not compostable, biodegradable, or it's just difficult to recycle, I'm looking at you, brand owner/manufacturer, to take responsibility for the entire lifecycle of the product. This is referred to as closing the loop or creating a 'circular economy.'

HP has had a responsible ink/toner cartridge disposal program for years, enlisting mail-ins, retail drop-offs, and



Vicki Strull's daughter, Edén, reusing an empty furniture box as a canvas

non-profit organizations that recycle for you.

Nike is also in the game with its Reuse-a-Shoe program, and a take-back program for children's shoes. For more than 25 years Nike's Grind program has turned worn-out running shoes into material for new sneakers or track-and-field surfaces.

The future of sustainability

In a 2018 global Nielsen survey, 81 percent of respondents felt strongly that companies should help improve the environment. Those are credit-card-carrying consumers who are driving change by leveraging their buying power, as well as their online reviews and social media platforms. It's clear that the sustained success of brands, manufacturers and print/packaging providers will depend in some part on their sustained commitment to the environment.



To continue reading Vicki Strull's design strategies, download her Sustainable Print Media Checklist at vickistrull.com/sustainability. More branding and design columns are available at www.labelsandlabeling.com/contributors/vicki-strull

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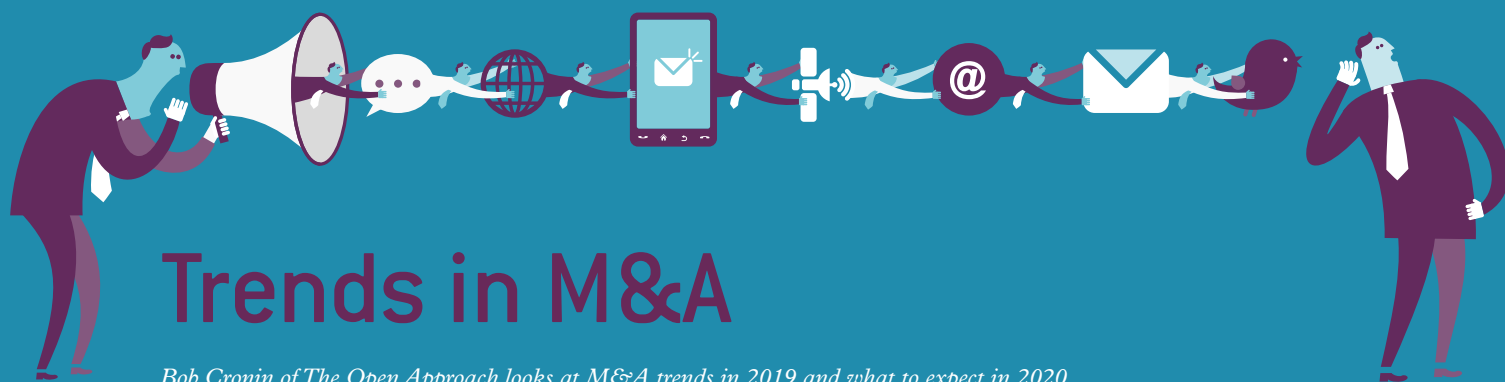


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Trends in M&A

Bob Cronin of *The Open Approach* looks at M&A trends in 2019 and what to expect in 2020

The year 2019 will be viewed as a great one for M&A at large, and the label and packaging industry in particular. We had a number of significant deals driven by the majors, private equity and other investors that caught the attention of news outlets and social channels. In addition to their producing great rewards for sellers, these deals elevated the already significant demand for label and packaging companies. Providers in virtually every category became targets, and those that sold were able to do so at attractive multiples. Thus, the question on the minds of owners who haven't yet engaged is: 'What are my prospects in the next 12 months?'

The best way to answer this is to review pressing trends. While there are considerations in every segment, there are drivers behind label M&A in general. Here are the top four we saw this year and how they might play out in 2020. Keep in mind that as an election year in the US, new dynamics can dramatically change expectations for M&A and the economy in general.

1. Change. Regardless of industry, the best companies are those that embrace change and adapt. If you haven't engaged in M&A or made significant capital investments in the past two years, you're likely behind the curve. Our largely mobile business community expects not only immediacy in service, but also the latest in technologies. If you can't give your customers access to the best label or packaging solutions, you can't provide it to an acquirer either.

Still, increased equipment and material costs have made it harder to keep up. While the majority of 2019 deals went to sellers of highly progressive companies, in 2020 we expect increased interest in targets that need some investment. Certainly they won't get the multiple of their cutting-edge counterparts, but they should have some good opportunities – as long as they're adapting to change.

2. Consolidation. The business world at large is developing into the Amazon.com society, and the label and packaging industry is following suit. In addition to working to increase shareholder value, there are continued efforts for companies to become 'one stop' suppliers. This aligns more closely with how procurement has shifted (purchasing clerk vs print buyer) and the correlated expectation for convenience and economies of scale. For many businesses, 'converging' into new segments isn't simply for growth; it's for survival.

In 2020, we expect consolidation to maintain or accelerate its pace. Thus, for smaller entities, it might be wise to search out your ideal acquirer (or strategic partnership) rather than wait for – and perhaps become prey to – other offers. Your ability to help an acquirer fill gaps in capabilities is key, as well as geographic presence. Having a big-name customer is not as attractive as it once was, as the nature of loyalty has changed.

3. Digital. Everything noteworthy in our business has a digital component. Paging through this magazine reinforces that. Digital creates the speed, cost savings, waste reduction and personalized 'experiences' demanded by today's buyers.

Increased investment in digital platforms will further blur the

"In 2020, expect to see the innovators recreate roles, introduce more technical-based positions, and revamp platforms to rejuvenate industry enthusiasm"

lines between service and cost-efficiencies. Concerns still remain regarding quality, performance and potential downtime in workflow, and most of these will be answered by some aspect of digital.

In 2020, strong privately held companies may be able to leverage their digital command for an even higher EBITDA multiple than we're seeing now (7-12X). Scrutinize any opportunity closely. The partnership of an experienced M&A advisor is key.

4. Staffing. A focus on STEM majors for college studies has brought about a crisis on the shop floor, in the estimating department and in customer service. Combine that with record-low unemployment, and there are way too few qualified candidates to fill necessary spots. The industry needs to address this waning interest of new recruits. But businesses themselves should be their own advocate.

In 2020, expect to see the innovators recreate roles, introduce more technical-based positions, and revamp platforms to rejuvenate industry enthusiasm. Smart recruitment will become the great differentiator. People make a business. It's not the marketing tagline or the beautiful plant. The companies with the best hiring, training, and engagement win – in M&A, long-term growth and success.

Outside of these four M&A drivers, there will be a number of other issues reshaping our industry. Perhaps one of the most intriguing is that labels and packaging continue to be used in creative new ways. Our customers are utilizing our products inventively for their businesses' development. As you examine your own future prospects, take a lesson from this creative thinking. Whether a buy-sell transaction, investment, technology revamp, or simply a tune-up, there are numerous ways you can grow your company.

If you truly analyze your opportunities and solutions, you can achieve the rich potential of your business in 2020 – and beyond. Let me know how I can help.



Bob Cronin is managing partner of *The Open Approach*, an M&A consultancy focused exclusively on the world of print. To learn more, visit www.theopenapproach.net, email bobcronin@aol.com, or call (+1) 630 323 9700. Read more M&A columns from Bob Cronin at www.labelsandlabeling.com/contributors/bob-cronin



Q&A

Yolanda Wang interviews Professor Cao Guorong, one of the most prominent influencers in China's package printing industry

Professor Cao Guorong is one of the most prominent figures in China's label and packaging industry. She is head of the Packaging Engineering department of the Beijing Institute of Graphic Communication, and concurrently the president of the Gravure Printing Branch of the Printing Technology Association of China (PTAC); the secretary-general of the Anti-counterfeiting Packaging Committee of the China Packaging Federation (CPF); the secretary-general of the Pharmaceutical Packaging Printing Professional Committee of China's National Pharmaceutical Packaging Association (CNPPA) and the secretary-general of the Package Printing Professional Committee of the China Standardization + Innovation Strategic Alliance.

L&L: Please explain the situation of the Gravure Printing Branch of PTAC. What are your major job responsibilities? What kind of role is the group playing in the industry's development?

CG: Since its establishment in December 2004, the Gravure Printing Branch of PTAC has organized a series of events under the guidance of PTAC to push forward the development of China's packaging industry, enhance the overall level of gravure printing and accelerate technical communication and cooperation with the wider printing industry. In total, the association has organized 15 sessions of its China-wide packaging and printing annual conference, six awards for package print design work, seven flexible package technical seminars and six folding carton seminars. The association has undertaken many surveys of overseas commercial sites and has contributed to more than 30 revisions of national industrial standards.

L&L: What is the current development status of China's gravure printing industry? What is the total volume of the gravure market and its main applications?

CG: The continuous development of China's economy and improvement of peoples' living standards and quality of life have driven the growing demand for packaging

and printing across all consumer-related sectors including food and beverage, cigarettes and wine, household chemicals, FMCG and pharmaceutical, health care products and home improvement. This has made gravure one of the major printing technologies in the China market.

Our gross statistics show that the market value of gravure in China was about 284 billion RMB in 2018, produced by more than 10,000 enterprises. Of this, flexible packaging accounted for 187 billion RMB, produced by approximately 8,000 enterprises. Of these, 1,284 are producing pharmaceutical packaging. Cigarette and wine packaging is worth 32 billion RMB with approximately 300 enterprises; decoration materials represent 26 billion RMB with approximately 200 enterprises; and the other package printing sectors account for approximately 39 billion RMB. Looking at substrates, paper printing accounts for 39.4 percent, plastic films and flexible package 46.7 percent and others 13.9 percent. From today's market trends the future gravure market is expected to maintain a growth rate of 3 percent.

L&L: What are the respective proportions of gravure-printed labels and flexible packaging in China? What are the future growth prospects?

CG: In 2018, the total output value of China's label printing industry was 46.87 billion RMB, increasing at a rate of 8.5 percent compared with 2017. The market value of flexible packaging was 187 billion RMB in 2018, accounting for 66 percent of China's gravure printing market.

Now gravure is in a period of relatively stable growth for both labels and flexible package printing. At present, unit-type wide format gravure presses still dominate the flexible package printing market in China, which is characterized by long runs, low price, wide format and high speed.

But with changing end user market demands, in particular the demands of young consumer groups for healthy, portable and personally engaging goods, run lengths of flexible package purchase orders are dropping off, while demands for



Professor Cao Guorong is president of the Gravure Printing Branch of the Printing Technology Association of China (PTAC), among other roles

diversification are gradually increasing. This of course has impacted the gravure printing sector.

Actually, there are many similarities between flexible package and label printing regarding materials, printing techniques, rewinding and slitting. In the future, as demands increase for short-run and personalized flexible packaging, the interaction of flexible packaging and labels will be further enhanced. Some flexible packaging manufacturers will produce certain label orders while some label converters also accept some flexible package orders.

L&L: Is environment protection now the greatest challenge for gravure printing? How should the industry cope with it?

CG: Environment protection has become a matter of life and death for printing companies. This year alone, five statutes relating to the 'green' development of package printing have been released, including: 1. Standard for fugitive emission of volatile organic compounds (GB 37822-2019); 2. Emission standard of Air Pollutants for the printing industry; 3. Guideline on available techniques for pollution prevention and control in the printing industry; 4. Emission standard of air pollutants for paint, ink and adhesive industries (GB 37824-2019); 5. Comprehensive treatment plan for VOCs in key industries (MEE [2019]53).

For the gravure industry, VOC governance follows a three-pronged approach: cut down VOCs at source, control the process and treat the emissions. The good news is, following the unceasing emergence of new technical solutions in recent years,

“There are many similarities between flexible package and label production regarding materials, printing techniques, rewinding and slitting. In the future, as demands increase for short-run and personalized flexible packaging, the interaction of flexible packaging and labels will be further enhanced”

solvent-free lamination equipment is now more advanced, selected adhesives are much safer and more environment friendly, and emission treatment technologies are more efficient.

L&L: How should we combine gravure printing technology with the current digital wave?

CG: Many converters in the package printing sector have felt the impact of the new trends in the end user market. Demands for personalized packaging are increasingly springing up, and short runs, customization and personalization have become the imperative challenges for package printers. Conventional long-run and batch printing may have difficulty in meeting these increasingly short-run needs. In this regard, the advantages of digital printing, such as no platemaking, more flexibility and environmentally friendly, are gaining more prominence. Particularly following the technical innovations emerging in recent years, digital presses and equipment have greatly improved in terms of width and speed. Digital printing has huge growth opportunities.

“Demands for personalized packaging are increasingly springing up, and short runs, customization and personalization have become the imperative challenges for package printers.”

For long-run jobs, gravure printing will continue to occupy a key position in the China marketplace due to its high efficiency and high quality. In future, gravure and digital printing will learn from and complement each other.

L&L: What contributions has the Gravure Printing Branch made in the past year to push progress and development across the whole industry?

CG: The Gravure Printing Branch held three seminar sessions in 2019. The International Flexible Package Technical Seminar was held by the Gravure Printing Branch in Guangzhou on May 23 during the period of the 33rd Chinaplas expo. Secondly, the VOC Treatment Forum for the packaging, decorating and printing industry was held



Professor Cao Guorong is one of the most prominent figures in China's label and packaging industry



The team at the Gravure Printing Branch of the Printing Technology Association of China (PTAC)

on July 26 during the 2019 China printing innovation conference, in which more than 100 industrial representatives took part. And thirdly, the fourth Congress of PTAC's Gravure Printing branch as well as the 2019 15th Annual Packaging and Printing meeting were held in Tianjin on October 12, where 18 speakers gave keynote speeches.

In addition, the Gravure Printing Branch has edited and published proceedings called China Packaging & Printing, and also established some WeChat groups for instant information exchange. In October 2015, the official public WeChat page of the Gravure Printing Branch popped up online and issued 155 articles to date of Aug 12, 2019, which greatly enhanced the efficiency of information exchange.

L&L: What significant measures will the Gravure Printing Branch take in the future?

CG: In 2020, the Gravure Printing Branch will intensify technical exchanges and cooperation with our gravure peers at home and abroad, while continuously elevating our gravure printing level, promoting industrial development and providing a bridging role to provide better services for member companies.



For more information on the flexible packaging market for label converters, see the recently released *Label Academy* book at www.label-academy.com

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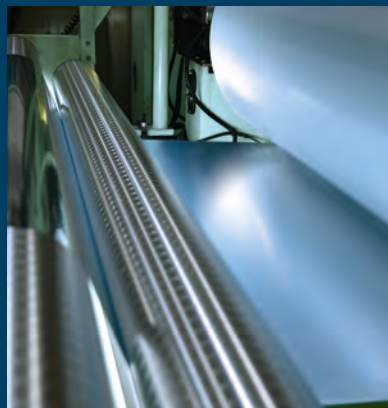
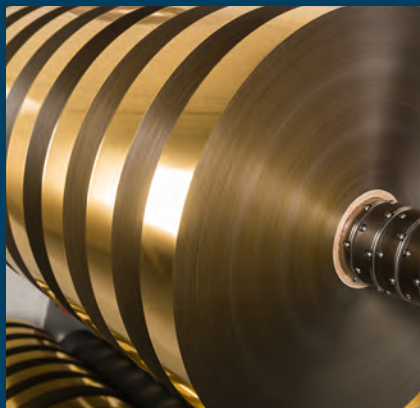
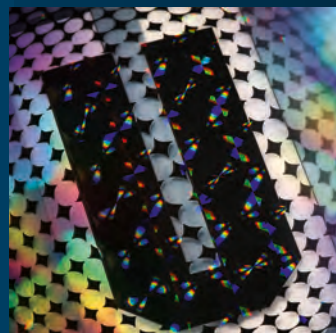


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Europe: looking to bounce back

Andy Thomas-Emans reports on a slowing market beset by economic and political worries – but looking to bounce back in 2019-20

Through 2018 the European label market continued its slow climb back to the growth levels seen before the crash of 2010-12. But a slowdown in the German economic powerhouse and uncertainties around the UK's Brexit drama contributed to an uncertain market outlook and a pressure-sensitive growth rate of just 1.4 percent compared to 3.7 in 2017.

This slowdown was also reflected in Finat's Radar converter and end user trends report, which saw converter sales growth fall dramatically from 8.3 percent in 2018 to 4.9 percent in Q1 2019.

Finat's survey does reveal a remarkable shift from growth in non-prime labels in 2017 to higher value prime labeling in 2018. This is supported by a reported 4.7 percent growth in polypropylene film volume in 2018, primarily used in Europe for high quality product decoration such as no-label look applications.

“Finat's survey does reveal a remarkable shift from growth in non-prime labels in 2017 to higher value prime labeling in 2018”

The finding also ties in with anecdotal evidence from flexo press manufacturers that converters are ordering more bespoke machines configured with a range of value added features including in-line booklet label makers, in-line digital units, gravure units and multiple foiling/screen heads.

The increase in installation of digital and digital-hybrid presses feeds into this new world of rapid product change and dramatically reduced product life-cycles.

Investment

Another interesting finding is on converters' investment plans. More European converters are planning to invest in conventional presses than digital through 2019-20. This demonstrates the advances made by the flexo press industry in automation and fast makeready, which have to some extent eroded many of the short-medium run advantages of digital technology.

Despite the overall slowdown in the PS label market through 2018, it should not be forgotten that Europe is a market which consumes 7.5 billion sqm of pressure-sensitive materials, or one quarter of global label consumption.

It is also important to analyze the strong regional variations in growth patterns.

Denmark, for example, enjoys Europe's highest consumption of

PS labels – 17.5sqm per person compared to a European average of 9.8sqm – but registered fairly low growth in 2018. By contrast, areas of Europe with far lower per capita consumption are growing much faster.

Eastern European demand for pressure-sensitive labels, for example, now accounts for 23 percent of total European consumption, almost double what it was in 2003.

Europe's converters are meanwhile facing other challenges apart from economic uncertainty: high labor costs driven by a shortage of skilled operators, increasing raw material prices, and the need to comply with increasingly strict environmental demands from regulators and brands.

Consolidation also continues to impact the European industry. The big news of 2018 was the expansion of All4Labels – resulting from the alliance between X-Label, Rako and Baumgarten – to include Italy's powerful Nuceria Group. This addition brought All4Labels to a total of 29 production facilities across the globe and a turnover exceeding 500m EUR.

In Scandinavia, private equity investors stepped in to acquire Emballage Gruppen and the FlexoPrint group, meaning the number of converters in Denmark alone has fallen from 27 in 2009 to 21 ten years later.

Up to here we have focused mainly on pressure-sensitive labels, but it is important to note that overall, shrink sleeve labels are the fastest-growing label category at over 5 percent, albeit from a smaller base, and now account for around one quarter of all labels by volume.

Are alternative decoration technologies a threat to labels in Europe? Flexible packaging is certainly a major competitor to pressure-sensitive and shrink sleeve labels. But European label converters – equipped with presses which can effectively handle filmic substrates – have turned this to their advantage by increasingly integrating flexible packaging production into their product offering.

This was well demonstrated during the Flexible Packaging Arena demonstrations at Labelexpo Europe 2019, and a continued increase in the number of show visitors registering an interest in flexible packaging. For the European label industry then, flexible packaging is turning into a complementary rather than competitive technology.

There were signs of a bounce in Q1 2019, and it will be interesting to see how this develops when we come to the next set of Finat statistics due in June 2020.



For more on Finat's Radar report, go to www.finat.com

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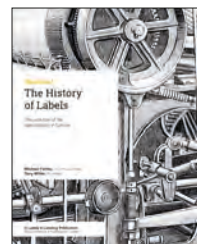
Despite the recent advances in digital printing, the great bulk of self-adhesive labels are still printed by conventional printing processes, namely flexography, letterpress and offset.

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North America: consolidating, diversifying

The North American label industry sees investment from private equity, as it grapples with ongoing issues. Chelsea McDougall reports

The North American label market in 2019 was marked by a flurry of high-profile mergers and acquisitions, splashy start-up businesses and further diversification into flexible packaging. This mature and fragmented market is expected to grow between 2 to 5 percent each year. Though the industry continues to appear healthy, the challenges that have plagued it for the past few years show no signs of retreating. Sustainability remains a hotly discussed topic and a skilled labor shortage and aging workforce continue to squeeze the entire supply chain.

Much of the mergers and acquisitions activity in 2019 was driven by growing interest from private equity in the labels space. The year started with a blockbuster merger between two of the region's biggest label suppliers, when Multi-Color Corporation was acquired by Platinum Equity, the PE group that owns WS Packaging.

In 2019, Fortis Solutions Group, owned by Main Post Partners, acquired Infinite Packaging and Label Technology. ProMach, a package machinery company owned by Leonard Green Partners, acquired Jet Label to expand its label base, and Inovar Packaging, backed by AEA Investors, acquired Flexo-Graphics.

Meanwhile, New York-based Macaran Printed Products took a different approach to succession planning when it announced that it is now 100 percent employee owned. CEO Nick Van Alstine said the ESOP was a way to protect and reward its employees who played a role in the company's success.

New kids on the block

While other parts of the industry were consolidating, there were several new greenfield start-ups that came online in 2019 to target a growing segment: digital flexible packaging production.

The North American flexible packaging market is valued at 25.3bn USD and expected to reach 30bn by 2023. By contrast, the label market is valued at 13.2bn USD, so it's no surprise that many label converters are looking at this as a lucrative route to diversify their businesses.

Suppliers are reacting to that trend. Labelexpo Europe 2019 saw a number of press manufacturers showing mid-web presses, including Bobst, Lombardi, Nilpeter, MPS, Mark Andy and Omet.

US-based digital flexible packaging producer ePac (founded in 2016) has invested 100m USD in 24 additional HP Indigo 20000 digital presses to double in size as the company continues its global expansion. Similarly, Wisconsin-based GOPak was founded earlier this year with an HP Indigo 20000 digital press and eBeam curing CatPak system from S-One Labels & Packaging. Nosco is also targeting the flexible packaging market with a 20000 press and Pack Ready Laminator from Karlville.

HP has traditionally cornered the digital flexible packaging market, but worth a watch are developments from Xeikon and

Market stats

About 85 percent of the label converters making up this 13.2bn USD market are companies with annual sales of between 1m and 10m USD. The North American label market is dominated by pressure-sensitive labels (57 percent), with shrink sleeves – the fastest-growing label format in recent years – now representing 18 percent of the North American label market.

Colordyne's aqueous pigment print engines from Memjet and its partnership with MPS. MPS announced at Labelexpo Europe 2019 that it will incorporate the Colordyne module into the MPS EXL-Packaging product line, targeting mid-web flexible packaging applications. Xeikon is targeting the pouch market with its Flexflow digital print and lamination system for pouch production. The company confirmed earlier in the year that converters can print pouches with its dry toner technology in a project with CS Labels.

Adding to the 2,300 label companies in the North American region were a few new traditional players. Catapult started in central Florida earlier this year with a fleet of Nilpeter presses. In addition to its acquisition mentioned above, Fortis Solutions expanded operations to Napa Valley, California, in a facility that will provide pressure-sensitive labels to the wine, craft beer and spirits industries.

Converters in this region should pay close attention to the cannabis packaging market. Canada has legalized marijuana, but the government keeps tight regulations on cannabis and its packaging. In the US, cannabis companies continue to come online, as more US states legalize marijuana for both medicinal and recreational purposes. However, cannabis is still a federally classified drug, which presents its own set of branding and banking issues.

But challenges persist. As has been written on these pages over the past few years, workforce struggles continue to plague manufacturing, and its effects are holding the industry back. The US Bureau of Labor statistics estimates that there are nearly 500,000 manufacturing jobs that remain vacant today. Many label converters have said they would consider adding capacity – new machinery, or additional shifts – but don't have the operators to run those presses. So far, the industry has been short on answers on how to address the talent shortage and aging press operators that will take the specialized skills with them to retirement. This is a key challenge that requires creative solutions.



The statistics in this article were provided by TLMi. For more info, go to www.tlmi.com

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Southeast Asia: opportunities and challenges

International suppliers are increasing their focus on Southeast Asia's fast-growing label market. Aakriti Agarwal reports

According to ICAEW, Southeast Asia's economy has grown at a moderate growth rate of 4.5 percent in 2019 and it is expected to stay stable in 2020. 'A sluggish global economy impacts growth in ASEAN,' says Piyapong Wongvorakul, managing director of Bangkok-based converter Trisan Printing. 'However, our market is huge and there is enough room to grow.'

Brenton Barrett, president Asia-Pacific at Multi-Color Corporation, echoes that there is a wide room to grow with ASEAN's per capita pressure-sensitive label consumption sitting at 1.6sqm.

2019 saw much activity in the region's label industry, including multinational companies moving into the region. RotoMetrics expanded its manufacturing footprint in Thailand, and Cron established a brand office in Malaysia. Machinery manufacturer Windmüller & Hölscher (W&H) opened fully owned subsidiaries with local service and support teams in Jakarta, Indonesia and Kuala Lumpur, Malaysia, at the start of 2019. MPS appointed an agent in Malaysia, and Koenig & Bauer Flexotecnica expanded its sales capacities with new appointments in Thailand, Indonesia and the Philippines. Further, Konica Minolta was evaluating appointing distributors in the growing markets of Indonesia and the Philippines. Armor Asia celebrated two decades of operations in Southeast Asia with a modern factory in Singapore. Many of the region's converters installed configured presses to cater to their customers' demands.

The Southeast Asian label market continues to grow in light of rising consumer spending, urbanization, the emerging middle class and an aging population offering opportunities such as home delivery, convenience and in-home care, increasing access to digital platforms catalyzing the growth of e-commerce platforms, and data mining. Brands are trying to utilize data collected from various online platforms to formalize consumer strategies, thereby increasing transactions on digital media. 'Online shoppers, however, do not bring an advantage to label printers because customers see labels online and not on shelves,' opines Wongvorakul. 'Therefore, for label printers to enjoy benefits of e-commerce, they will have to develop smart, functional and on-demand labels.'

Henky Wibawa, executive director at the Indonesian Packaging Federation, says single portion flexible packs and packaging that is functional during transport and at point of sale are gaining traction.

Indonesian market size

According to Henky Wibawa, executive director at the Indonesian Packaging Federation, the Indonesian packaging industry is valued at around 6.8 billion USD. Its growth rate is expected to be at 6-7 percent next year due to continued economic growth.

Healthcare packaging is a fast-growing segment, as is transparent packaging in the food sector.

As in most other growing markets, sustainability is a buzz word. Oran Sokol, director and general manager of HP Indigo Asia Pacific and Japan, says: 'Studies find that the green packaging market is poised to reach 237.8bn USD by 2024, with 5.7 percent CAGR during that period.'

According to Wibawa, some trends expected to be key in Indonesia are lightweighting, new materials, improved recyclability and smart packaging. 'ASEAN countries are looking to collaborate in many environmental areas including the study of sustainable consumption and production,' says Wongvorakul. 'This will enable companies to manage and implement government regulations more efficiently. Recycling is yet another challenge. Companies won't be able to use a combination of different layers on a pack for long, due to recycling challenges. They will have to shift to monolayer materials in packaging. This has also led to a shift from pressure-sensitive labels to films and shrink labels.'

The region is seeing strong growth in the flexible packaging segment. According to a Transparency Market Research, the Asian flexible packaging market is poised to reach a CAGR of 5.7 percent to 6.7 billion USD from 2016 to 2024. Wibawa agrees: 'Flexible packaging represents the largest and fastest-growing packaging segment in Indonesia, with a share of 45 percent. Growing markets include food and specialty packaging, industrial and consumer packaging, hygiene and medical care, and rigid packaging.'

Challenges

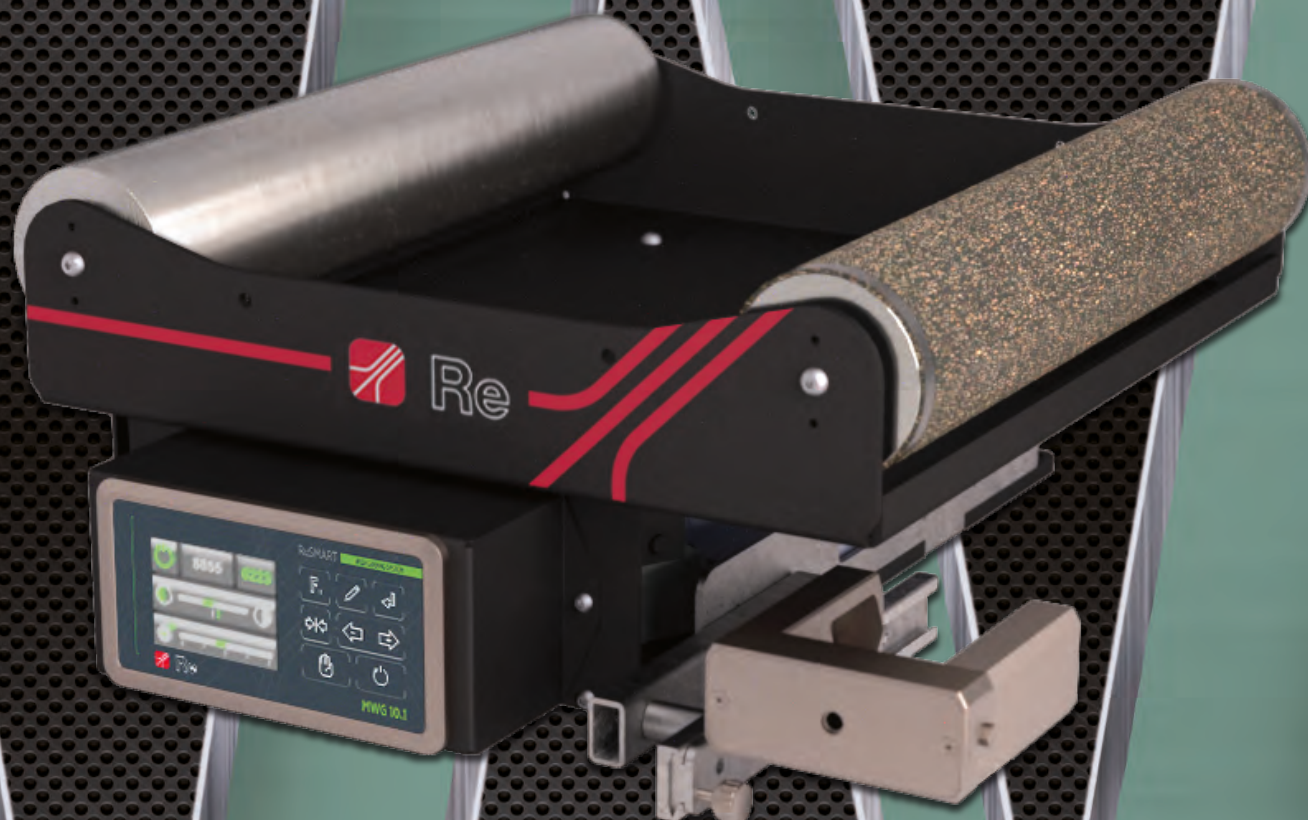
'Sheet-fed converters diversifying into label and packaging production is increasing price competition in the market,' says Wongvorakul. 'Therefore, existing label converters will have to be more efficient by improving their processes, being focused and adopting latest technologies that can fulfill market's expectations.'

Adds Wibawa: 'Brand consciousness amongst consumers and demand for lower packaging cost by brand owners remain a challenge in the Indonesian market.'

Among the key industry challenges cited by Barrett are rising costs throughout the supply chain; 'the overriding need for speed'; shorter run lengths and lead times and more SKUs; and environmental compliance requirements from brand owners, such as score cards and audits 'Everybody wants sustainability but nobody wants to pay for it.'



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China: digital gains

Online shopping has propelled PS label growth in the logistics sector, while the RFID label market is flourishing, writes Yolanda Wang

China's economy grew steadily through 2018, with data from the National Bureau of Statistics showing GDP at 90.03 trillion RMB, up 6.6 percent from 2017 and exceeding the government's growth target of 6.5 percent. In the first half of 2019, China's GDP reached 45.09 trillion RMB, a year-on-year growth of 6.3 percent in comparable prices. The government's Quarterly Macroeconomic Model (CQMM) predicts GDP growth in 2019 to be 6.3 percent, down 0.3 percent.

The latest data from the Label Printing Branch of the Printing and Printing Equipment Industries Association of China (PEIAC) shows that the gross output value of China's label printing industry was 46.87 billion RMB in 2018, up 8.5 percent from 2017. Although lower than the industry's historical growth rates, this is still higher than the global growth rate of 6.9 percent reported by AWA. The gross output volume of the adhesive label sector was 6.4 billion sqm, up 10 percent from 2017.

'Internet +' is the most important new technology model in the conventional label printing industry. There are two aspects to this. On the one hand, online shopping, driven by mobile internet technology, has propelled PS label growth in the logistics sector. The latest data from the State Post Bureau of China shows that the volume of express delivery in China was 50.7 billion parcels in 2018, up 26.6 percent from 2017. China has become the world's largest consumer of express delivery parcels in five successive years. The value of the annual online retail sector is approximately 7 trillion RMB.

The possibilities opened up by a combination of internet technology and conventional labels has led to a surge in development of RFID labels and tags. The development of China's Internet of Things had been incorporated into the government's national development strategy since 2010, presenting the Chinese RFID and IoT industry with immense development opportunities.

Data from China's RFID industrial alliance shows that the market value of the country's RFID industry grew consistently between 2011 and 2018. In 2019, demand for RFID labels will continue to rise and the applications will cover an even wider range. RFID is already applied in many sectors including finance, mobile payments, city public utilities, transportation, medical and health, food safety and anti-counterfeiting.

Data from China's Ministry of Industry and Information Technology shows that financial payment is now the biggest market for RFID applications, accounting for 27 percent of the total; next comes transport management (12 percent), military security (11 percent), identification (11 percent), public utilities (7 percent), warehouse logistics (6 percent) and asset management (5 percent). Apparel, medical, food and other applications are still in the early stages of development.

The Qianzhan Industry Research Institute predicts that the

compound annual growth rate of China's RFID market will remain at around 15 percent, and will break through the 200 billion RMB barrier in 2024. Labels and packaging are the delivering mechanisms for around one third of total RFID output.

Printing technology

Letterpress still dominates China's label printing market. But with the increasingly strict environmental protection policies of the Chinese government, especially the environmental tax levied since 2018, and the increase in demand for short-run, personalization and customization in the end user market, flexo and digital printing are accepted by more and more printing companies and end users. It is predicted that flexo printing will soon account for 12-15 percent of the total output of China's package printing industry.

The rapid growth of flexo in the label sector is driven not only by the impact of government environmental policies, but also by improvements in flexo press technology, substrates and inks from domestic suppliers. 2018 China's Flexo Ink Industry Development report shows that the gross output of key ink manufacturers in 2018 was 755,000 tonnes, of which flexo ink accounted for 76,000 tons, or 10.06 percent.

According to the report '2019 Flexo Press Installations in China' in Printing Technology magazine, there were 225 unit-type flexo presses installed in mainland China and put into operation between July 2018 and 2019, with narrow web flexo presses for label printing accounting for one third of the total. Of these 225 flexo presses, 198 were made in China – 88 percent of the total – and 27 were imported, or 12 percent. Domestically manufactured flexo presses now predominate in China's flexo industry.

New trends noted above towards variable data and personalized labels and packaging have greatly benefited the digital printing sector, putting the technology firmly into the spotlight. But in China, it is still at an early stage of development. Many label converters have taken a good look at digital printing, but have not taken the plunge. This is mostly because they need to invest not only in digital printing presses, but also auxiliary pre-press software, production consumables, post-press and inspection, both hardware and software. They also have to consider how to give digital full play by implementing new marketing and management strategies.

Many have invested in digital of course. In 2019, label converters such as Super Label, Shanghai Gurong, Tianjin Xiangjiang and Shanghai Zhiqin installed their first digital presses.



Read a review of *Labelexpo Asia 2019*, which took place in Shanghai in December, in the next issue of *Labels & Labeling*

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India: growth in a challenging climate

2019 has been yet another year of fluctuations in India but the market continues to grow in double digits. Aakriti Agarwal reports

The Indian label industry has gone through several changes in government regulations, starting from demonetization in November 2016, implementation of GST in July 2017, and now the ban on single use plastic by 2022. These slowed the industry in the short term, but have proved beneficial for the long-term growth of most professionally run businesses.

Sharing his insights on industry's performance in 2019, Harveer Sahni, chairman of Weldon Celloplast, says: 'The first three quarters saw an increased number of reports on installations because of healthier topline of smaller businesses that made them opt for high-end label presses. By September there were reports of a slowdown that was more pronounced in the automotive sector and gradually spreading to other sectors. However, given the size of India's population and increase in demand, the growth of labels is steady and will continue being so.'

Ajay Mehta, managing director of SMI Coated Products, says: 'Overall, there is a dampening spirit in the worldwide economy but it has not deterred the growth outlook of the industry. However, as the industry matures in India, economies of scale will bolster more efficiency into the system. Newer innovative label solutions will boost the industry.'

While flexo largely remains the technology of preference, an increasing number of converters are also investing in digital technology. 'This is a welcome sight,' comments Mehta. 'It reflects the willingness of printers to come up with innovative products to cater to the needs of their clients. Digital presses should be acquired to create new applications and not just to use it for short runs. This will create new opportunities and wealth.'

Indian companies have been discussing ways to improve efficiency with current infrastructure while also investing in latest equipment. Mehta continues: 'Indian printers are now consuming an average of 125,000sqm of labelstock per machine per month compared to 100,000sqm about two to three years ago. An increasing number of automated inspection systems being installed in India reflects the keenness towards automation. The majority of printers today have started a quality control department and ERP implementation is happening across the country.'

Improving efficiency in production has been discussed at various forums. The LMAI conference in 2019 saw several speakers including Carl Brock, global application specialist for Bellissima discussing

"Many companies have started to implement green factory initiatives"

digitally modulated screens (DMS) that offers stable flexo dots while delivering ink saving, consistent print quality and reduced waste. Hannes Rogler and Martin Hoppel of Rogler International discussed optimization tools and software that can handle up to 15,000 different jobs a day, thereby streamlining the flow of information through different processes.

'Most leading printers across the country are implementing better production techniques to achieve efficiency and MIS systems to enhance their savings from reduced down times and wastages,' agrees Sahni.

Sustainability

Sustainability and waste management is fast becoming an imperative, with the country facing a serious pollution problem. Citing an example, Sahni says: 'One printer was regularly burning label waste in a vacant plot next door. The pollution control department took pictures and sent the company a notice with penalties. Gone are the times when investment in waste management equipment was not even considered. Many companies have started to implement green factory initiatives and it is good to see the responsible trends in the industry.'

'When the Prime Minister starts talking regularly about recyclable, biodegradable solutions, and banning single use plastics, sustainability becomes a major buzz word,' says Ajay Mehta. 'The government has brought about a lot of awareness. Brand owners, printers and consumers are equally interested in sustainable packaged goods.' SMI Coated Products has been switching its clients from 85 micron PE to 50 micron PP. 'We studied this application on shampoo bottles and brand owners conducted trials successfully,' says Mehta. 'As a result, around one million sqm of PP labelstock will now be consumed by this brand instead of PE, thus saving 42 tons of plastic annually. Similar applications have been developed using lower gsm chromo papers. Printers are also successfully using 65gsm thermal paper instead of 74gsm.'

'However, to bring about this change in our industry at a large level, everyone has to join hands across the spectrum. We must leave our competition and provide sustainable solutions for the well-being of our future generations.'

Per capita consumption

According to Avery Dennison, 30 percent of India's label production is pressure-sensitive, and per capita consumption is 0.5-0.6sqm a year.



For more information on environmental sustainability, read Danielle Jerschefske's green column in this issue

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Africa: a year of mixed messages

A tough business climate is countered by evidence of ongoing technology investments and a focus on innovation. Gill Loubser reports

For the seventh consecutive year, Cape Town has been voted the best city in the world by some 39,000 readers of The Telegraph who took part in the 2019 survey. Described as 'a coastal gem, lying in the shadow of a cloud-hugged mountain, where wine flows, penguins waddle and – not too far away – majestic beasts roam', Cape Town has retained its leading position despite any number of shifts in the top 20 cities.

Privileged as your correspondent is to live at Africa's southernmost tip among the vineyards in Cape Town's Constantia valley, it's sometimes difficult to comprehend the gloom that covers much of South Africa – indeed the entire African continent. However, it's a sad fact that, despite Cape Town's idyllic status, business confidence has weakened.

The South African economy faces major challenges: insipid growth, a deteriorating fiscus and wide-scale mismanagement of state-owned enterprises (SOEs). This year's GDP growth is now forecast to be 0.5 percent, down from the 1.5 percent projection made earlier in the year, as the economy battles high unemployment and a rising public service wage bill. In addition, loss-making SOEs (Eskom and South African Airways are two notable examples) continue to put pressure on the public purse, with constant government bail outs. At the same time, Standard & Poor's has demoted our credit rating from stable to negative, citing low GDP growth, rising deficits and a growing debt burden.

"One prominent Cape Town-based label converter described how 2018 ended on a high note with significant increases in sales volumes"

However, against that rather gloomy outlook, there is positive news to be found. One prominent Cape Town-based label converter described how 2018 ended on a high note with significant increases in sales volumes, and a feeling of excitement engendered by Cyril Ramaphosa's appointment as president, replacing the corrupt Jacob Zuma (thankfully, now facing trial).

But earlier this year the excitement dissipated as the country again faced periodic power outages – thanks to the aforementioned Eskom – and the onset of a recessionary environment.

Nonetheless, this label business – as is the case with many other packaging enterprises throughout the land – remains intent on upping its game, investing bravely in the latest technology to enhance production throughput and label quality, to slash waste levels and improve competitiveness.

Providing a snapshot example of Africa's woes, the once mighty Nampak is certainly feeling the pinch. For the last three decades, Nampak has been tagged as Africa's largest packaging company, with production facilities throughout the continent.

However, times are a-changing, and the company has been selling off non-core assets to raise funds. Prime objectives are to reduce debt, cut costs and push into high-margin (even if problematic) markets in the rest of the continent to offset slow growth at home. One such sale was Nampak's glass business that went to a JV between Kwande Capital and SABSA Holdings, SA Breweries' holding company owned by Anheuser-Busch InBev, the world's biggest brewer and among the largest glass manufacturers.

The recent headline 'Nampak loses nearly R2-billion amid crisis in Zimbabwean currency' speaks volumes about the African business climate. Nampak has previously warned that currency volatility in Angola and Zimbabwe is affecting performance, but despite such problems has maintained its commitment to these markets.

Ongoing innovation for world-class packaging

Apart from ongoing technology investments, packaging innovation continues unabated. The Institute of Packaging's Gold Pack Awards is entrenched as the premier event for South Africa's packaging fraternity. And it's clear from this year's results that innovation remains the industry's mainspring, ensuring world-class packaging.

Capturing the overall Gold Pack Trophy, plus two category gold medals, was Durban's Shave & Gibson Packaging, recognizing the innovative handbag-shaped Goats Do Roam bag-in-box wine carton. This is just one example of home-grown innovation. The company's strapline reads Innovation, Quality & Service Delivery, and innovation is first on the list for a very good reason: in today's tough economy, this is a primary point of differentiation in a highly-competitive folding carton market.

Underlining growth in cross-border trade between South Africa and Zimbabwe was the Star for Africa award that went to Dairypack Tubs (part of Cape Town's Polyoak Packaging) for in-mold labeled tubs for Ideal Mayonnaise, produced by Zimbabwe's Pangolin Products. This marks Zimbabwe's first move to marketing mayonnaise in plastic tubs. The full-length IML offers superior graphics and added oxygen barrier, while a wide rim and foil seal extends shelf life, essential in a market where demand is unpredictable and the supply chain is tough. Tubs and lids are lightweight and nest compactly for efficient transportation from Cape Town to Zimbabwe for filling.



For more from Gill Loubser on the African market, go to www.labelsandlabeling.com/contributors/gill-loubser



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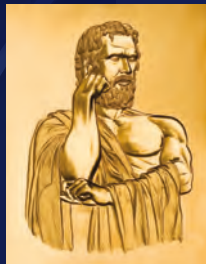
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PREDICTIONS FOR 2020

*Leading industry experts look at the key challenges and talking points
likely to dominate the label and package printing industry in 2020*

Andy Thomas-Emans, Labels & Labeling

My prediction for the 2020 is for an exponential increase in interest in, and application of, machine learning (AI) and automation in all aspects of the label and package printing industry.

AI will not replace skilled human input, rather it will lend 'cyber assistance', multiplying the efficiency and effectiveness of the human operator and manager. AI will increasingly be linked to, and implemented by, closed loop automation systems.

These trends were clearly presaged at Labelexpo Europe in Brussels, with inspection leading the way.

So in 2020 we will see cloud-linked AI-driven cameras capable of learning from print errors not only on the target machine, but across all installations, anywhere in the world. Such a system understands the difference between, for example, incorrectly mounted plates, or the wrong plates, out of tolerance spectrophotometric color measurements and so on, and will feed back to the operator and factory manager re-planning strategies and advice on troubleshooting that error.

At the same time, presses and finishing equipment are increasingly equipped with open operating protocols, which are able to interact with factory management systems to open up new possibilities in cyber-assisted plant management and total quality control.

Mike Fairley, Labels & Labeling

2020 is likely to be another milestone year in the world of label production, predominately geared towards ever-more digitization and workflow automation, faster job changeovers, enhanced efficiency, reduced downtime, less ink and substrate wastage and exciting new embellishment and added value solutions.

Labelexpo Europe 2019 undoubtedly pointed the way, with streamlined pre-press to pressroom connectivity, to new press technology and software advances bringing new levels of automation to plate, cylinder and flexible die changes, to in-line color measurement, to slitter and knife set-up, press management and web inspection, semi-automatic turret rewinding, non-stop winding, adjustable anvils and automated waste stripping – all creating significant improvements to productivity, and ultimately profitability.

Bring all these developments together in the latest generations of hybrid analog/digital presses and the result going forward will be the creation of some of the industry's most sophisticated in-line and automated multi-process

"AI will not replace skilled human input, rather it will lend 'cyber assistance', multiplying the efficiency and effectiveness of the human operator and manager"

– Andy Thomas-Emans, L&L

machines that will be able to create almost undreamed of new printed, embellished and converted solutions. And all linked in with advanced MIS and business management software, artificial intelligence (AI), cloud computing and fast-evolving IT possibilities.

These new advances will also continue make a significant contribution towards better industry sustainability, energy usage and waste reduction, enabling the production of exact quantities, faster and more efficiently, with less wastage, and real-time performance monitoring of production equipment.

The future of the industry will surely look very different.

"We strongly believe in a future where every physical item will have a unique digital identity which will transform the visibility of products throughout the supply chain"

– Pascale Wautelet, Avery Dennison

Bob Cronin, The Open Approach

Given global economic fears, it may seem bold to predict a strong 2020 for any industry. Yet labels and packaging has a resiliency unmatched by its counterparts. Its broad practicality and continued creativity in formats and abilities keep its star shining brightly.

In 2020, we'll build on the same themes we did this past year, across every segment and niche. In particular, you'll see three major drivers: Mergers and acquisitions, digital manufacturing, and personalization.

First, expect to see continued consolidation. It's being driven by the majors and private equity investors building out strategic models. Those models are based on their perceived opportunities in various segments. This underscores a belief in large-scale growth far beyond 2020.

Next up is digital. Digital will be the focus of everyone in labels. The improved quality, increased substrate and color choices, and quicker lead times align digital with customer demand. This is not just happening in labels but in every segment of the graphic arts.

Finally, personalization will be at the crux of virtually every marketing campaign. It will also expand via personalized labels, smart packaging, product sampling, and other go-to tools. Nothing impacts business growth more than a direct customer connection.

With the impact of these drivers, we can expect 2020 to be one of our most profound years yet.

Pascale Wautelet, Avery Dennison

For the last few years, our predictions for the year ahead have focused on the growth of intelligent labeling and sustainable packaging. And this year, once again, our focus in these areas remains a priority.

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We continue to strongly believe in a future where every physical item will have a unique digital identity which will transform the visibility of products throughout the supply chain, all the way to the consumer, helping to improve efficiencies, increase sustainability and enhance the consumer experience.

Sustainability is continuously accelerating and remains central to our business strategy at Avery Dennison. In 2019, to create an even clearer focus for our teams, we distilled our eight sustainability goals into three broader ones: deliver innovations that advance the circular economy; reduce environmental impact in our operations and supply chain; and be a force for good, adding value for all our stakeholders.

As well as delivering new materials that contain increased recycled content, our R&D teams are committed to delivering solutions that will advance the circular economy. One such innovation, launched at Labelexpo Europe, is the newest addition to the CleanFlake Portfolio – CleanFlake Flex – which is specially designed for use with freshly blown PET bottles, helping ensure the containers are easier to recycle.

In 2020, as well as launching even more sustainable innovations, we look forward to our industry working closely together to accelerate a more sustainable future.

Christian Menegon, HP Indigo

We can expect agility to be the new norm, replacing pure performance. This will be at the converter's level, but also at the brand's. Agility requires acting based on data which new innovations in sensors and in machines will allow. Information flow will connect existing islands which were typically disconnected. There will be a complete end to end flow of information simply due to the digitalization possibilities. Information can be the job order, the file to print, the proof of delivery, the logistics parameters, the MIS connectivity, the ERP connectivity, the color values, but also the track and trace hidden code, etc. All these new connections, and probably more, will reduce waste, errors, production time, and therefore go to market faster at a cheaper overall cost.

These levels of automatization will facilitate more focused products delivered in smaller batches more often, will facilitate e-commerce, and will allow customization all the way to personalization.

As a consequence, brands will enjoy the use of the mandatory print on the label to transform it as a bi-directional communication media. This opens up the giving of information from the brand to the consumer, and the gathering of information from the customer by the brand. Both sides will benefit from this exchange. We can think of using that same property to allow authentication and tracking at the item level. The computer systems today have the power to handle this amount of information; the next generation will be even more powerful.

We can predict the brand to be at the center of an information system that links his label supplier to the consumer demand.

We can predict the label supplier to use business automation systems connected live to his increasingly automated machines. These machines, besides being more agile, will still need to deliver consistent quality and a differentiation which will come from new technologies, probably digitally driven. The expected quality will not suffer from any compromise since the technologies allow to maintain it, and even increase it. The agility will be extended to allow multiple applications, and the printer will offer print services for more than labels.

We can predict the consumer to express his wishes to the brand, and the brand to deliver what is demanded when it is demanded. Allowing the consumer to interact with the design

and delivery of his product will grow, while not becoming standard in the short term. The amount of information collected will feed the whole system and will make the changes go faster.

Not all big brands will be able to change quickly, which means smaller ones – more agile by definition – will emerge and gain market share for a few years, then some acquisitions and mergers are expected.

All these connecting components, mainly 'digital', coming from innovation and use of a given technology outside of its initial intent, will drive faster change. I think that 2020 will be the year where these interconnectivities will start to flow.

"In 2020, expect to see an increasing number of small and medium-sized brands benefit from digitally printed flexible packaging"

– Carl Joachim, ePac Flexible Packaging

Carl Joachim, ePac Flexible Packaging

2017 and 2018 saw the emergence of digital printing for flexible packaging, and in 2019 market awareness and utilization of its value to brands began to gain traction.

In 2020, expect to see an increasing number of small and medium-sized brands benefit from digitally printed flexible packaging. Low minimums, no plate fees, fast time to market, and order to demand will have a major impact on how quickly brands can go to market and accelerate growth. Large CPGs, too, will increasingly see how digital can be used for marketing campaigns, niche products and test marketing.

Variable data printing has been around since Xerox introduced the 9700 in the late 1980s. It drove the concept of one-to-one marketing that today is commonplace. There are numerous examples of both variable data and graphics being used in the label and folding carton markets, however for flexible packaging the concept is still new. I expect to see an increasing number of brands and retailers start to use variable data printing for consumer engagement, brand protection, product authentication and track and trace applications.

There is also the issue of sustainability and our environment as it relates to plastics. We will continue to see acceleration of the development of recyclable, compostable and recycled materials, and – just as important – municipal, state and national regulations that strive to fix the ineffective recycling practices in the US today. In many ways, we need only to look to Europe to see the future of plastics in our environment.

Jakob Landberg, Nilpeter

From a political and socioeconomic point of view, I hope to see less political uncertainty in central Europe and the UK, and believe that this will stimulate growth in our industry. Furthermore, as various heated trade talks cool off, and mutually beneficial agreements are finalized, North and South



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American markets should progress, with increased activity and investments. The industry-wide consolidation that we've seen in the past few years will undoubtedly continue – both for converters and suppliers. We will see label printers migrating into new flexible packaging sectors. I believe we'll see an increased focus on combination printing, both with conventional and digital hybrid technologies, and – in large part due to low cost consumables – increased interest in highly efficient offset presses, primarily for short-run production of high-end labels. Improved efficiency trumps capacity in these sectors with automation and 'clean-hand technology' at the forefront. Last, but certainly not least, the green wave will continue, rightfully so, and we'll respond with less waste, lower power consumption, biodegradable substrates and the like.

Thomas Schweizer, Gallus

The declining job sizes in product decoration are driven by local adaptations, temporary promotions, print security, and other requirements for individualization. Accordingly, brand owners discover the opportunities for digital end-to-end production and design their supply chain towards flexibility, agility and speed to market. The way forward is to (pro)actively listen to brand owners and printing houses, understand the individual applications they need to stand out from the crowd, and co-create innovative solutions to fulfil consumers' expectations.

Machine equipment that allows for fast and easy changeability of jobs and processes will become the key driver behind the omnipresent efforts to optimize productivity and efficiency such as lean management. The growing importance of ROI and life-cycle oriented calculations result from the ongoing transformation in the packaging and label industry from manual artwork to industrialization. Obviously, hybrid printing is perfectly suited for that transition, combining digital and conventional converting technologies in the spirit of best of both worlds.

On the road to fully integrated digital workflow management, the idea of a solid-free production will be visible in the print shops of the future in terms of both intelligent machine equipment and the network-driven data cloud that connects the diverse devices and interfaces. The Internet of Things creates a symbiosis of hardware and software with clear advantages for process transparency, error prevention and finally production efficiency. Digitalization in the entire workflow chain from pre-press to dispatch and the respective digital business models will become a standard in our industry.

"Labelexpo Europe 2019 clearly showed that a variety of complex printing technologies must co-exist in the narrow web market"

– Benoit Demol, Codimag

Benoit Demol, Codimag

Labelexpo Europe 2019 clearly showed that a variety of complex printing technologies must co-exist in the narrow web market.

Label converters face complex challenges from the perspectives of the supply chain, the economy and rapid technological change. First, there is a continued trend towards shorter runs, along with expectations of higher quality and shorter delivery times. Second, competition is becoming more intense – not only because existing label converters have improved their performance with as a result of new machine and software technologies, but because new players are entering the market, with wider web or sheet-fed printing capabilities.

The convergence between the markets, the expected global economic slowdown, and the digitalization of printing, converting and logistical processes are arguably major threats to the industry. But these changes can also be seen as opportunities, for those investing in technology that offers quality, productivity and flexibility.

In addition, these economic and technological trends provide favorable conditions for increased merger and acquisition activity in the coming months, for both label converters and their suppliers.

Atze Bosma, MPS

In recent years, we've seen several developments within the label and package printing industry. Connectivity and hybrid flexo-inkjet printing have been major topics, and both are still growing in popularity. Still for 2020 and years to come, we expect growth in hybrid press sales, as well as a growing interest in the benefits of connectivity in label businesses.

Increasingly, data-driven service and a more scientific approach in business efficiency are becoming important. If a press runs at only half of its capacity, there are many improvements to make in the printing process. Industry 4.0 and connectivity are key.

Another focus is the supply chain integration between ink and substrate manufacturers up to end users, the brand owners of FMCG. These long chains get integrated. Brand owners' issues become challenges for converters and machine manufacturers. What are their struggles and how can a press supplier help solve them? We're looking for ways to offer extremely high-quality results, innovative but also in a sustainable and cost-effective way. I believe it should be a win-win-win situation. Never choose between quality, sustainability or efficiency: always have all three ingredients together.

Philip Easton, Domino

Sustainability: This has been both a risk and an opportunity for quite some time. I predict a major shift now from this being something that has largely been marketed, but with little investment or prompting real major change, because the cost to implement and the cost of the packaging has been a more dominant consideration, to where it is now going to happen. Besides greater political will, a key driver is the greener, cleaner new generation expanding in the workforce. It will affect the label converter sector in a number of ways, but most importantly the types of packaging will change and this will lead to a different mix of packaging decoration types. Currently, much of the focus is on reducing plastic PET bottles, but I think sustainability requirements will change as we better understand the overall circular economy impact, including the cost and resources to produce and recycle packaging, and not just the recyclability of the materials.

Waste reduction: There is a well-established trend for shorter runs and more SKUs as well as growth in specialty craft type brands in almost all sectors. This will continue to drive label

converters to printing/converting systems that have fast set-up times, such as digital printing. The sustainability influence is going to drive the move to digital printing even further, as brands will target reducing the write-offs for packaging inventory they do not use. Supply chains will need to respond to an ever more 'just-in-time' form of delivery, with short lead times and working with the minimum amounts of inventory. Brands and converters will increasingly look more closely at the start-up waste required to print a job, less related just to cost, but more to the sustainability.

Decline of the high street: We are already seeing bricks and mortar retailers going into bankruptcy, especially in the UK, in a wide range of industries. The reality is that almost all the growth is in online sales. From 2009 to 2018, the share of European food and grocery e-shopping has almost doubled (92 percent growth) accounting for 25 percent of sales. How might this affect the label sector? If you cannot see the label on the product when purchasing, will you really want expensive embellishments such as silkscreen and foil? Brands may switch their spend from more elaborate packaging to online marketing. Digital printing will also benefit as more focus moves towards streamlined supply chains.

Luca Goldoni, Cartes

A wave of transformation is hitting all types of industries, including printing, and that is why it is so difficult to make predictions. People are adopting modern techniques to expand their business and capabilities. They are looking for new technologies to cope with the competitive and fast-changing market. With the adoption of the Internet of Things, the printing industry is looking for more advanced devices targeting the

easier overall workflow and use. We expect the request for multifunction printing and embellishing machine to grow with a booming demand for an all-in-one machine.

Geert Van Damme, Cerm

Everybody in the label industry has been talking for years about decreasing order quantities and increasing numbers of orders. In recent years we have observed an increasing complexity in products (flexible packaging, piggyback labels, booklet labels) and in production equipment (hybrid presses, finishing machines that can print some extra colors), alongside an increase in environmental and safety rules. On top of this, customers contact you in many ways and are no longer ashamed to call you in your private time on your mobile phone. So, your employees will need to be flexible and able to adapt to continuous change, even when we see that youngsters are looking for a better work-life balance. For some printing companies this will require a shift in the kind of people they hire. From craftsmen, we will move to computer operators; from specialists to flexible all-rounders. The human resources of the printing industry will have to be prepared.

Ajay Mehta, SMI Coated Products

2020 is likely to be a year which will begin with some circumspection. The economies worldwide are not encouraging. Politics has always affected businesses, but never more so than today. The world watches and reacts to trade tariffs imposed by different countries either unilaterally or in response. The US presidential elections will be watched with keen interest. Major investments are on hold as financial turmoil is expected

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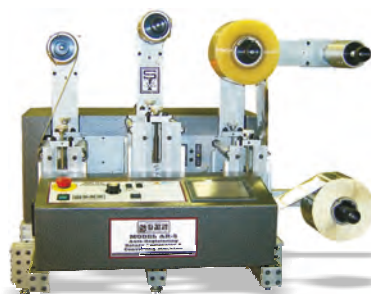


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“From a political and socioeconomic point of view, I hope to see less political uncertainty in central Europe and the UK, and believe that this will stimulate growth in our industry”

– Jakob Landberg, Nilpeter

in 2020. In today's world of WhatsApp, LinkedIn, Twitter and Facebook, social media is bringing about change in attitude and contributing to decision-making like never before.

The current situation of economic slowdown in India is expected to continue for a couple of months, if not more. All this brings about a negative atmosphere with regard to investment. On the positive side, a number of converters have started

exporting and this is helping them. While local orders have slowed, they are well occupied due to export orders.

We have full faith in the Indian economy. Fundamentally we are a consuming economy, and we expect it to bounce back in full force soon. 2020 may start with circumspection but as it will progress we expect a fantastic year ahead.

Gary Seward, Pulse Roll Label Products

2019 has been a tough year for the industry in terms of changing regulations and the reclassification of many raw materials for printing inks. It's probably been the most challenging year in terms of ink reformulation changes and every printing ink company is in the same position. That challenge, with the choice of raw materials reducing, is ongoing and over the next few years we expect to see this continue. As an ink company, we are committed to following EuPIA's guidelines and ensuring we comply with the latest industry standards and regulatory requirements. Not just for the benefit of our customers and end users but, crucially, to safeguard the welfare of our staff who are involved in the manufacture of inks, varnishes and coatings.

Printing press, plate, ink and anilox technology continues to evolve at a great pace. The quality of flexo printing has advanced dramatically over the past two decades. Today, brand owners expect tight color tolerances and standardization on a global scale and this trend will undoubtedly continue in the year ahead. Converters recognize the true value of digital pre-press control for accurate color – this is key for label printers who want to future-proof their businesses.

With more and more converters investing in digital printing to

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“Machine equipment that allows for fast and easy changeability of jobs and processes will become the key driver behind the omnipresent efforts to optimize productivity and efficiency such as lean management”

– Thomas Schweizer, Gallus

complement their conventional flexo printing business, there is also a need to ensure that brand colors are consistent irrespective of the printing process. By matching digital devices to flexo presses, short runs can be completed on digital presses, with mid-longer runs using the flexo process, ensuring an accurate color match across the different technologies, wherever you are in the world.

Nick Coombes, Publicity Studio and L&L contributor

Trends to look out for include the growth of digital technology in the package print sector. Already well established in the narrow web sector (labels), the wider and faster presses will make inroads into flexible packaging, folding cartons and corrugated. Watch out for more digital finishing/converting options too, and the migration of narrow web flexo into mid web widths for extended product capability such as sleeves, pouches and other flexible packaging.

The adoption of LED technology for curing inks and lacquers – initially an expensive option because of limited demand for

“Watch out for more digital finishing/converting options too, and the migration of narrow web flexo into mid web widths for extended product capability such as sleeves, pouches and other flexible packaging”

– Nick Coombes, Publicity Studio and L&L contributor

the systems and availability of suitable inks and lacquers, falling costs will show its true benefit in terms of production savings, reliability and improved curing.

The increased use of sophisticated new filmic substrates – developed for a variety of reasons from better visual effect to improved performance to recyclability, the new materials will require significant investment in new technology, including plasma coating, to maximize their potential.

Jimit Mittal, Monotech Systems

The perception of label converters in India towards digital printing has changed: they are seriously evaluating the addition of digital printing capabilities in-house. The industry will see an increase in the number of digital press installations. Previously, digital was placed for just short run jobs to complement flexo on the production floor, but now it's being seen as value addition and being considered as a faster way to grow in business.

We believe 2020 will see at least 25 to 30 digital press installations in India, which will pave the way for further growth opportunities in the market.

Converters are also looking at hybrid digital presses that will enable them to do all finishing and converting along with printing in one go. This will help reduce waste and quicken turnaround time at minimum costs. Another trend is that of mid web presses, which opens up yet another segment for label printers.

Alex Cruz, Yupo

Packaging and sustainability will continue to be key for brand owners, manufacturers and consumers in 2020. In Japan, for example, brands continue to decrease the amount of food content and the size of the packages are becoming smaller, thus an increase in total number of packages. All of which results in an increase in the total number of labels produced. In addition to seeing this trend spreading to other regions, there will be a focus for these products to be sustainable and 100 percent recyclable by the end of the product's life cycle if possible.

Yupo's customers are looking at ways of reducing plastic in their packaging by eliminating virgin plastic whenever possible. The trend is to move to 100 percent recycled plastic containers and within a targeted time frame. We all know that plastic will not go away. We cannot just produce 100 percent plastic free packaging across the entire packaging industry; 'better plastic' is needed. In-mold labels are the ideal alternative for brands that are looking to address environmental concerns. Unlike pressure-sensitive labels which create tons of waste with removable liners, in-mold labels are 100 percent recyclable and offer lower waste at all levels of the supply chain.

Doug Niemeyer, Teklynx International

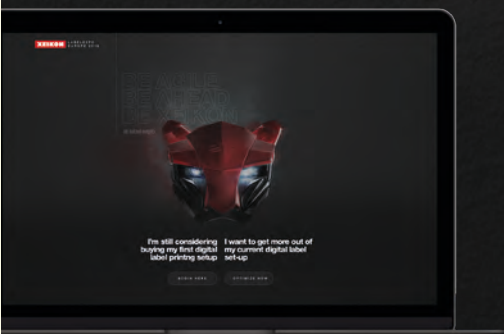
Globalization continues to rise with labeling in multi-site, multi-language environments, with the need to adhere to labeling requirement standards that vary by location. IoT, blockchain, and cloud technologies are growing in demand, as is the need of a single, unified solution managing supply chain labeling, integrating with ERP and other business systems.

On-demand color labeling and incorporation of artwork is becoming more prominent for manufacturers as industry standards and government regulations that require the use of color on labels increase. The ability to leverage hi-resolution artwork on labels and product packaging with a secure label approval process provides organizations with a faster and more efficient time to market.

Good labor is difficult to find. Automation becomes more of a need to account for a decreasing operational headcount and organizations are looking to label printing automation

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and full business system integration to streamline barcode label production. Organizations are finding that this digital transformation of labeling is producing additional ROI on their existing systems and processes.

Lean and continuous improvement is 24/7/365, meaning the reduction of manual errors and waste of all kinds is paramount. Manufacturers are shifting to a more secure and efficient supply chain labeling process of enabling user permissions and automated label approvals with eSignatures, resulting in a 'lean labeling' process.

Ranesh Bajaj, Vinsak

While the label industry continues to grow at a healthy CAGR, there have been a few hiccups in 2019. Especially in India, 2019 saw a slowdown in the growth of the economy which in turn impacted the capital good purchases and hence equipment sales were deeply impacted. As the industry matures and the economy starts to grow faster again, we hope 2020 will see robust capacity growth again. The stressed automobile and telecom sectors in India are impacting the label industry severely, and we need to create new use cases for labels to grow the business.

On the technology front, two key pillars will be functionality and sustainability. More than the print and aesthetics, functionality of labels is becoming the key differentiator as brand owners look for the label to do more than just convey the details of the content and meet regulatory needs. Hangar labels, multi-layer, booklets, tamper-evident labels, among others, all are growing at a rate twice the standard CAGR, if not more.

The other growth area is sustainability. More eco-friendly materials, linerless labels, IML labels without using release

"We believe 2020 will see at least 25 to 30 digital press installations in India, which will pave the way for further growth opportunities in the market"

— Jimit Mittal, Monotech Systems

liners, are increasingly being used. Brands are now asking for measurable features which they can show to their customers to portray their company as being a responsible corporate citizen and promoting sustainability. Organic foods packaged in brown kraft are now considered the most premium over the colorful packaging that was all the rage in the early 2000s.

Mark Day, Armor

This will be the decade that industry must take a greater

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Print Width: 350mm / 13.75"
Speed: 75m / 250' per minute

PicoJet 254

High Speed Reel to Reel

The new 10" PicoJet press has the same specifications as the PicoJet 350, including static control, web cleaner and corona treatment, but has a print width of 254mm and runs at 50m/min. It is a high speed production system for use with offline-finishing systems.

Print Width: 254mm / 10"
Speed: 50m / 164' per minute

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responsibility for its impact on the environment through the implementation of initiatives that deliver tangible benefits for all. So, in 2020, Armor will continue its commitment to be the most environmentally conscious provider of thermal transfer ribbons, with a wider rollout of SolFree, the only TTR products worldwide to be manufactured with zero solvent in the production process (even for the backcoat).

The ability to recycle products will progressively become a prerequisite that will require industry to invest in collection initiatives that will cost-effectively enable used thermal transfer ribbons to be recycled. For many years Armor has operated a 'zero landfill' policy and currently recycles all production waste as Solid Recovered Fuel (SRF). 2020 will see this initiative extended to major users that place a value on corporate social responsibility.

Efficiency in logistics, supply chain and delivery times will continue to be a key focus due to an increasing need to deliver products more quickly, with enhanced traceability and often directly to the end-user.

Ken Moir, NiceLabel

As we look ahead to 2020 and beyond, it is clear that the labeling market is being driven by the broader IT trends of digitalization and modernization. In enterprise resource planning (ERP), for example, this combination is transforming systems, with SAP software in use today rapidly migrating from SAP ECC into the new business suite of SAP S/4HANA.

That's just one example but it is important because it is part of a wider IT modernization trend that ultimately impacts on labeling. When large enterprises update ERP, one of the natural

"From craftsmen, we will move to computer operators; from specialists to flexible all-rounders"

— Geert Van Damme, Cerm

consequences is that they will subsequently modernize their labeling systems and often migrate to or implement a new standardized global labeling solution.

In other words, the impact on labeling is part of a wider chain of events driving IT modernization. And that chain is accelerating as new technology comes on stream. That is why we are seeing a pipeline of new opportunities for global labeling solutions or label management systems today across the industry that is larger than we have witnessed for many years.



A longer version of this article can be read on www.labelsandlabeling.com



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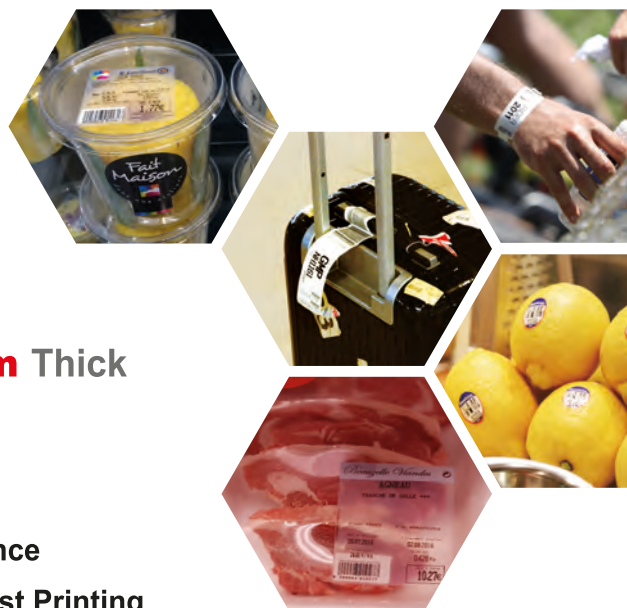
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Labels, packaging and sustainability

Awareness of packaging's environmental impact is accelerating, writes Danielle Jerschefske

Nielsen data from 2018 shows that half of US consumers are highly likely to modify their consumption habits to reduce their impact on the environment; sustainably minded-shopper spend is directly impacting FMCG sales growth. Sales of products with sustainable attributes make up 22 percent of the total store in the US and have an average annual growth rate of 20 percent versus conventional products with a growth rate of 2 percent. By 2021, the market expects consumers to spend as much as 150bn USD on sustainable FMCG goods.

International awareness about plastic pollution and the drive for reduction in single-use plastic has forced governments into action. The European Parliament has approved a law banning single-use plastic items such as plates, cutlery, straws and cotton buds by 2021. The products covered by the law constitute 70 percent of marine litter items. It has also mandated that plastic bottles contain at least 25 percent recycled content by 2025.

Europe's single-use plastic ban emphasizes the notion of 'extended producer responsibility' for plastics producers, or the 'polluter pays' principle.

India's government, too, has adopted plastic waste management rules that mandate no single-use plastic by 2022, while the acceptance of multi-layer pouch materials is still under review. This year Constantia Flexibles, one of the top three flexible packaging companies in the country, made invested in a new facility in Ahmedabad dedicated to producing mono-PE laminated films, which have more opportunity for recycling in a growing number of collection streams.

"Industry buyers are including sustainability goals and metrics in packaging RFQ documents and vendor contracts"

Congressman John Shimkus of Illinois is the chairman of the House Subcommittee on the Environment and the Economy, and the co-chairman of the House Recycling Caucus with Frank Pallone. 'Recycling is a vital part of our economy that creates tens of thousands of jobs for workers here in the United States,' says Shimkus. 'In order to increase recycling we must promote new markets for recycled materials, encourage manufacturers to design their products for recycling and eliminate unnecessary impediments that hinder recycling.'

The Institute of Scrap Recycling Industries says that scrap recycling generates 4bn USD in state and local revenues annually – approximately 200bn USD nationwide.

Brand targets and achievements

The biggest legacy brands are setting goals to make products and packaging that have less impact on the environment. Colgate-Palmolive touts impressive achievements: 43 percent of its packaging materials by weight globally come from recycled sources, and some 82 percent of its packaging is considered recyclable. The CPG has reduced the amount of waste per ton of production sent



A group of US converters has diverted 8,000 tons of label waste from landfill

US converters divert waste from landfill

US label converters Grand Rapids Label, Yerecic Label, Hub Labels, Syracuse Label and Surround Printing, CCL Label St Louis, and Outlook Group have diverted more than 8,000 tons of label process waste from going to landfill since 2018.

to landfills by nearly 41 percent since 2010.

Industry buyers are including sustainability goals and metrics in packaging RFQ documents and vendor contracts. Various brand stakeholders now include sustainability measurements in performance targets – engineering, procurement, operations. Customers are requesting help from their supply chains, including label vendors, to use a percentage of recycled plastic, recycling compatible materials and downgauged materials in the specifications purchased. APR is providing guidance to Walmart buyers, other leading retailers and national and regional CPGs.

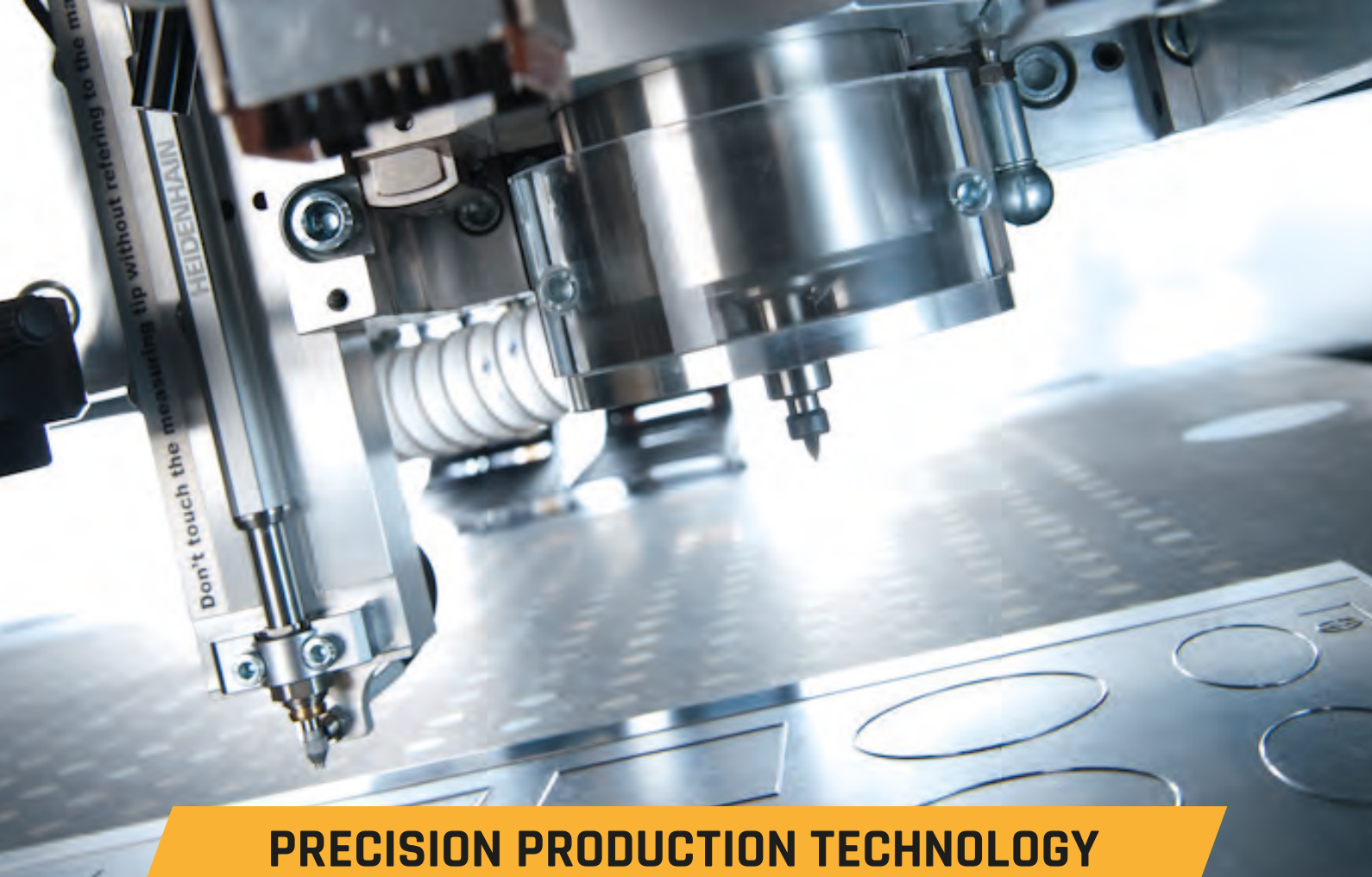
The demand for labels that allow PET recyclers to maintain the highest value possible in rPET is accelerating rapidly with the widespread adoption of SPC's How2Recycle logo program and the association's education to brand decision-makers. Awareness has grown so rapidly, in fact, that stakeholders across label users are asking pertinent questions about label material selection and recycling compatibility.

Nestlé Waters North America has demonstrated its commitment to use rPET. It has three nationally distributed bottled water offerings on the market made using 100 percent recycled plastic. The bottled water producer works with a number of strategic suppliers to purchase recycled plastic and plans to expand its supplier roster. The company is committed to achieving 25 percent recycled plastic across its US domestic portfolio by 2021, and 50 percent by 2025.

The Scrap Recycling Industries (ISRI) named Nestlé Waters North America as its 2019 Design for Recycling (DFR) Award winner for the design of its 100 percent rPET Nestlé Pure Life 700ml bottle. The pressure-sensitive label uses an APR-approved structure to ensure the highest value of rPET to be resold to the market. The company has also launched its DC Collection water bottles using an APR-approved shrink sleeve material.



Read more from Danielle Jerschefske at www.labelsandlabeling.com/contributors/danielle-jerschefske



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Direct-to-container revolution

A five-year pilot project at the world's largest brewer has led to the first commercialized use of direct-to-container UV inkjet printing for premium beer bottles. Andy Thomas-Emans reports

AB InBev has demonstrated fully commercial direct-to-container printing of beer bottles in a pilot operation located at the company's Tattoo Alpha plant in Haasrode, in Leuven, Belgium.

The company is the world's largest brewer, with global brands including Becks and hundreds of other beers.

The direct-to-container project has been running since 2014, and while AB InBev has tested small batches to mark specific occasions, it has now rolled out a 200,000 Becks bottled beer project – the first time the technology has been used in the broader mass market.

'Direct-to-object printing means designs for small batches are now possible with just four weeks from design approval to retail shelves,' says Simon Gerdesmann, manager of the Tattoo Alpha Print site. 'Fully variable, personalized designs are now possible and individual codes can be incorporated into the design for limited editions. In the case of the Beck's project, together with our design agency we elevated the designs to match the unique direct-to-container capabilities.'

Gregory Bentley, whom L&L readers will recall led the 'Share a Coke' implementation during his time at Coca-Cola, has been overseeing the Tattoo digital print platform since joining AB InBev in early 2018. 'Our team have been developing this technology along with the Dekron team, as well as looking to the future capabilities and technologies to further improve and expand opportunity spaces,' says Bentley.

In operation, empty bottles are automatically depalletized and conveyed through an oven to burn off any existing coatings and dirt. A primer is then applied to prepare the print surface.

The circular Krones Dekron decorating machine uses Xaar UV inkjet heads with UV LED pinning and a final mercury lamp cure. Individual bottles enter the carousel and are rotated and moved up to the print stations, allowing multiple print passes to be achieved. After final UV cure the bottles are moved out of the machine to the automated palletization area.

Line speeds are currently up to 2,500 bottles/hour, but the technology team believes speeds up to 15,000 should be possible. Bottles are decorated before the filling and sealing process, as the UV used to cure the ink would affect the beer pasteurization process.



The Becks artist limited edition bottles launched on the UK market

“Direct-to-object printing will never replace labels – for the time being this is a complementary technology for special projects”

New opportunities

The line is capable of printing in full color, CMYK+White and varnish. The ability to varnish in multiple passes opens up new opportunities to simulate glass embossing. The tactile varnish can be fully variable, making possible wholly new design combinations with variable full color print. This would usually require digitally printed labels in combination with screen print.

'We are working to educate agencies in how to design for the system, and we are learning with them. We are one above alpha, so this is production version one,' says Simon Gerdesmann. 'The best thing is, we don't have to wait for three weeks after we have passed the proof to see the labels. We just load the file straight into the system. We are able to print at photographic quality, including convincing flesh tones.'

There are some limitations. Firstly, there is no currently available camera technology able to inspect 360 degrees of variable print at the higher line speeds the unit is aiming for. Secondly, metallics are not currently available.

'We also need to work on logistics,' says Gerdesmann. 'How to get bottles into particular stores; how to make sure the bottles don't get "lost" in the brewery and so on, because the kind of applications we are talking about could include printing the

results of sports matches, for example.'

In terms of sustainability, not only does the line eliminate plastic labels, but AB InBev's tests show that the directly printed UV ink does not affect glass recyclability – the ink simply burns off.

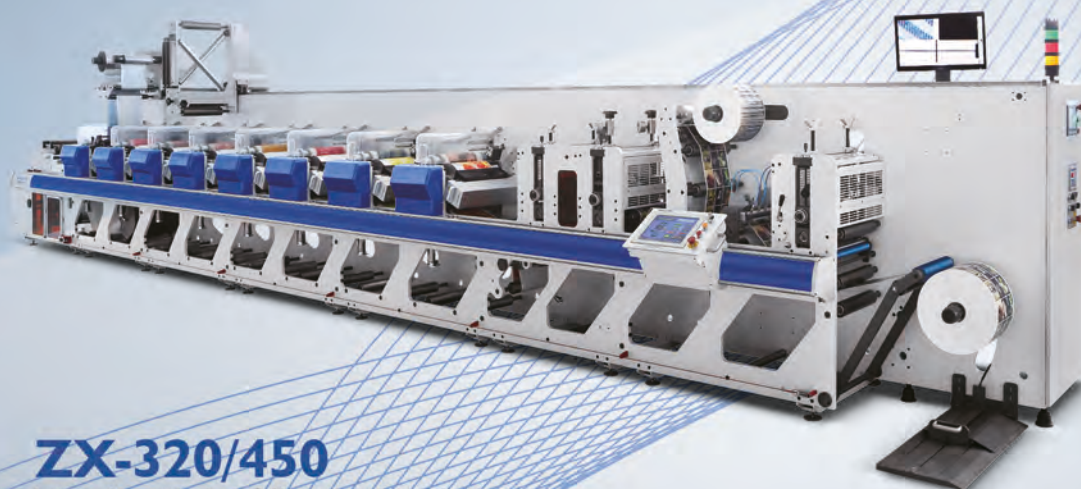
Gerdesmann concludes: 'Direct-to-object printing will never replace labels – for the time being this is a complementary technology for special projects. But direct object printing on glass is a revolution in print and AB InBev is pioneering this technology. Digital embossing is one of the most unusual capabilities of this technology. We can mimic traditional glass embossing, bringing a new dimension to bottle decoration – consumers will feel and experience a bottle in a completely different way.'

How does 'direct to' compare to the nearest label alternative – shrink sleeve digital decoration with combination silkscreen print? 'The economics will depend upon the quantity, as well as other issues,' says Gerdesmann. 'But of course we do save the cost of label materials and the result feels premium in a way that shrink often does not.'



See the next issue of L&L for another unique advance by AB InBev: linerless labels

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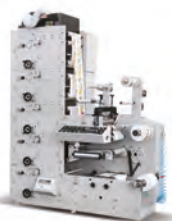
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WQM-320G/420

Adhesive Label (logo)
Die-Cutting Machine



ZBS-320/450

Stack Flexo
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ZM-320

Rotary/semi-rotary
Label Die-cutting
Machine



Happiness breeds success at Ritter Haftetiketten

In a globalized age of strong competition and constant drive to hit targets, it is easy to forget that the heart of any company is its people. But this German converter's success is built on strong relationships with staff, suppliers and customers, writes Piotr Wnuk



L-R: Wolfgang Ober, technical director of Ritter Haftetiketten, and Denis Westhauser, marketing manager at Spilker. The two companies have worked together for more than 40 years

A company's culture is often apparent as soon as you enter the door. L&L's tour of Ritter Haftetiketten had already started while your correspondent was waiting in reception. Many employees passed through the busy area; there wasn't one who didn't slow down to smile and say guten morgen.

When technical director Wolfgang Ober arrives, smiling, he confides: 'I shouldn't be here, to be honest. I have passed my retirement age and should be at home relaxing, but I love this place and this industry so much that I simply cannot stay home. I must come here each day, see everyone and make sure product lines are running as they should be. This makes me a happy and relaxed person.'

"I shouldn't be here, to be honest. I have passed my retirement age and should be at home relaxing, but I love this place"

The company was established in 1971 by Rolf Ritter, who produced the first labels in a small factory in Bielefeld. This family run business quickly grew and expanded into a bigger site in Enger, a few miles away from Bielefeld, but still in the heart of Germany.

Today, Ritter prints adhesive labels using flexo, offset, screen, digital offset and combination printing. The Enger headquarters is now also home to the company's in-house graphic design and development departments.

Around 65 percent of Ritter's customers come from the food and beverage industry. The company also provides labels for cosmetics, medicines and pet food. It produces the full range of labels from standard one-pagers, listing ingredients and nutritional information, through to special multi-purpose labels for promotional purposes and 32-page booklets. Ritter also focuses on applications for innovative materials, inks and adhesives.

The company registers an annual turnover of around 19m EUR and employs more than 140 people. Its success is highly dependent on human talent and a strong focus on its regional market, working with companies within the 200km radius from the headquarters in Enger.

Values

'Quality is the most important thing for our existence,' says Ober. 'It is the basis for the long-term trust of our customers in our efficiency and the continuous commitment to our company. Quality also shapes our relationships with our customers and our partners, suppliers of goods and services, as well as our employees. Quality does not only extend to our products, but also to the entire service in all areas of the company, from product development to sales. But above all we maintain a human and happy atmosphere in our factory and in business relationships.'

The company's values are evident in every part of the production process. Ritter Haftetiketten has been working with local businesses right from the beginning to build a strong and reliable supply chain with relationships going back decades.

'One example is Spilker, a flexible dies and rotary tools manufacturer, located in Leopoldshöhe, just a short drive from our headquarters,' explains Ober. 'We have been working together for over 40 years and to be honest with you I could not imagine us not working together. During the last few decades we have built a strong and trustworthy relationship. I know that if we are ever in trouble and needed urgent help, I can call on them at any time, and they will do all they can. This does not happen often, but it is a great reassurance that if we need help, we will have it as soon as possible. That's why local relationships are so important for us.'

Strong relationships are also extended to the company employees. Thirty-two percent of them have been working for the company for more than 25 years, proving that the care and honesty is highly valued by the workforce. Ritter also invests heavily in new talent, offering apprenticeship programs to young professionals from the region, which often lead to full-time employment.

Building on its core values, two years ago the company added a further production site in Gehrde in Westphalia, which nearly doubled its production capabilities.

'This not only brings more production lines and more Ritter quality: it opens new doors to more local businesses and local communities,' concludes Ober. 'I do not see more labels produced, I see more meaningful relationships and the extension of Ritter love. We turn our customers' ideas into reality, but we would never be able to do so without happy people on our production lines.'



For more information, go to spilker.com and ritterhaftetiketten.de



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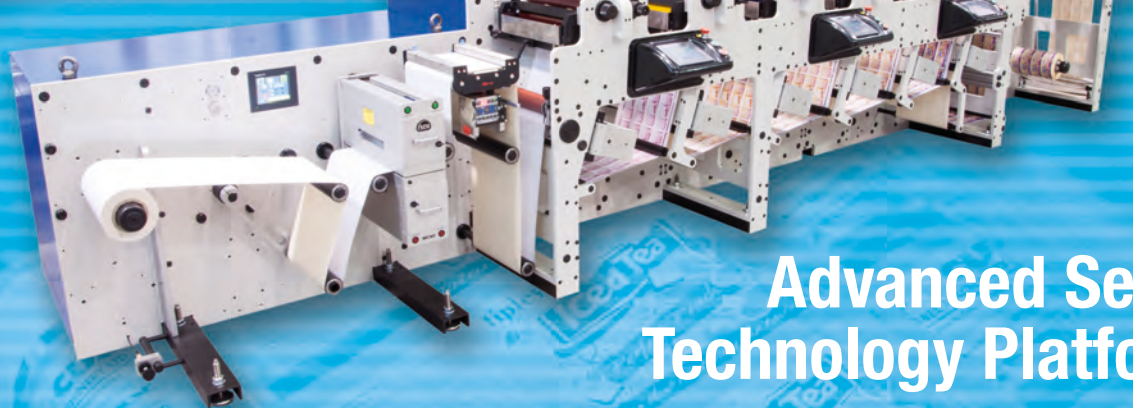
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Leading by example

AA Labels has grown from a small family business into a major UK label converter. But in Lahore, Pakistan, it is known for running a free medical clinic serving hundreds of patients a day. Piotr Wnuk reports

AA Labels is a family owned business specializing in label production and design. Its products are now an integral part of most supermarket shelves and several industry sectors globally.

The company was established in 2006, when a family owned toner cartridge business required labels for product identification and shipment. Due to the high volumes required, the family decided to invest in machinery to produce the labels in-house.

'It was actually an add-on,' explains Sohail Sethi, managing director of AA Labels. 'Our toner cartridge business required specific labels which we couldn't find anywhere, so we decided to invest in a machine and start their production. Then we thought, if we can make high quality labels for our business, then why not sell them online? And then it just took off.'

This decision has put AA Labels on the UK converting map. Once the new equipment was up and running, initial excess capacity was taken up by offering labels to the cartridge business' customers.

The company heavily relies on a web-to-print business model, and focuses on improving the website's interface to make placing orders an easy and transparent process.

'Several label manufacturers have their products featured online, however there is often no pricing, there is no indication of what is actually required or if the order has additional one-off costs. Consequently the order must be placed over the phone or by email,' says Ian Axelsen, business development manager at AA Labels.

Simplicity

'I think we've been very successful at bringing simplicity to the label industry and making our products accessible to anyone around the world via our online portal. Our website is very transparent, showing exact prices and with no hidden costs, but most of all it is very straightforward and intuitive. The process is very similar: our customers receive proofs of the artwork, which they can approve or amend and once this stage has been completed, then the labels go into production and are scheduled for delivery as fast as possible.'

The company recently installed an HP Indigo WS6800 digital press to streamline production, expand the printing side of the

"I want to support people who are less fortunate in life. I feel that it is everybody's duty. It is not necessarily about having money or not having money. It is more about mindset and the feeling of making a positive change"

business and increase its productivity, while providing high resolution printing, intelligent color matching and reduced production waste.

At the same time, AA Labels also invested in two AB Graphic Omega 350 converting machines, which are expected to increase capacity for sheet labels, improve accuracy and speed, and expand its range of label formats, shapes and sizes.

'This is a significant investment for AA Labels,' says Axelsen. 'Our goal is to maximize capacity within the existing site. In terms of production staff operating the equipment, we are now up to a team of 15 within the factory and warehouse on one day-time shift. We are now planning to increase capacity further in line with demand with the introduction of additional work shifts.'

According to Axelsen, AA Labels is growing in excess of 20 percent each year in terms of volume, with the label printing part of the business almost doubling year-on-year. 'It is our continuous investment in people and technology that contributes to the expansion of services and winning of market share for the business,' adds Axelsen.

The company currently operates five converting lines with plans for a further six-figure investment in three additional roll label converting machines. Installations are scheduled for March 2020. While waiting for the equipment delivery, the company is



AA Labels recently installed an HP Indigo WS6800 digital press



AA Labels' first printing and converting line, from AB Graphic, is still in operation today



Production manager Umer Anwar

“We've been very successful at bringing simplicity to the label industry and making our products accessible to anyone around the world via our online portal”

expanding its headquarters in Peterborough to an adjoining office and production space, which recently became available.

‘We are currently negotiating with one of the equipment suppliers. We are about to invest in label technologies such as embellishment, embossing, silk screen, spot varnish, hot foil, peel and reveal. These are add-ons to our current label production, however they are going to perfectly complement the range of products that our customers will be able to buy from us,’ comments Sethi.

‘That decision has not been driven so much by exact financial gains in the modeling terms. We believe that the technologies we are investing in will continue to grow,’ adds Axelsen. ‘It will probably take 12 to 24 months to see a return on this investment, but the main reasoning is to expand our offering.’

Despite significant growth registered in the past few years, AA Labels is still a family owned and run business, which now involves two generations in different departments of the company. The family feel is one of the core values clearly visible in the company and among all employees, but it also extends to charitable work.

Social responsibility

As part of a corporate social responsibility ethos, the business has chosen to create and support a charity with great importance to the directors of AA Labels. Sethi, who was born in the UK and lost his mother to illness at an early age, subsequently spent several years living with family in Lahore, Pakistan. This is where he met Asifa, his future wife and one of the current directors in the company, whose family also originate from the city.

Following the strategic decision to relocate and further develop its accounts, the company's IT and studio design teams are now based in Lahore. For this purpose, it acquired a property which is now occupied by its own medical clinic on the ground floor, with offices above.

The motivation behind opening the clinic was to assist with the alleviation of hardship associated with poverty through the provision of free medical services in a city that has such important connections for the company directors.



Finishing system from Grafisk Maskinfabrik (GM)

Unfortunately, the provision of free clinical services such as this are not common, hence the need to expand the size of the clinic and the range of services provided to keep pace with demand.

‘I want to support people who are less fortunate in life. I feel that it is everybody's duty. It is something that we should all do. And it is not necessarily about having money or not having money. It is more about mindset and the feeling of making a positive change. Whether you donate one or 500 pounds really depends on your financial situation,’ says Sethi.

The clinic currently employs six full time staff, practice manager, two doctors, nurse, pharmacist and non-clinical member of staff. It serves 300-400 patients a day for consultations and repeat medication, dealing with ongoing illness and medical conditions such as asthma, diabetes, high blood pressure, respiratory illness and urinary tract infections, and dispenses daily around 300 free prescriptions for medication. The clinic also provides a free testing service for blood sugar levels, blood tests, scans and urine tests.

‘We have about eight to ten thousand patients a month. But we never charge for medication, we don't charge for prescriptions. Our clinic is completely free,’ says Sethi.

The charity has recently installed a new proprietary MIS for making appointments, dispensing medication, stock control, patient records and analytics. This technology has been designed and developed entirely by the IT team at AA Labels and since the implementation the benefits to both staff and patients have been considerable.

‘We have developed this software from scratch, simplifying patient visits and following their medical history right from start to finish. Since we have implemented it in the clinic, we managed to generate a considerable cost saving, which we immediately transferred towards the cost of the medication, therefore we are now able to serve even more patients,’ adds Sethi.

All staff members have been provided with laptops and the daily organization of appointment allocation, stock control and procurement has not only improved, but will in future provide valuable data to better inform decision making regarding the charity's investment needs.

‘I am really proud of my father,’ says Kieran Sethi, general manager at AA Labels and Sohail's daughter. ‘He is the driving force behind our family and behind our business, too. He is very driven, always trying to find ways to do more for our customers, to support them and serve them better. He has a contagious, positive attitude, which is picked up each day by every member of our team. He is guiding us and leading by his example both in business and in life.’



For more information about AA Labels, go to www.aalabels.com

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More than 30 exhibitors showcased smart technologies designed specifically for packaging

Smart packaging made real

The eighth edition of the Active and Intelligent Packaging Association's (AIPLA) Congress – the biggest in its history – reflected increasing interest in smart packaging. Piotr Whnuk reports

Let's create some chaos,' said Eaf de Ferrante, managing director of AIPLA, during his opening speech. Reflecting current interest in smart packaging, the AIPLA Congress welcomed more than 400 delegates to Amsterdam. 'The focus is on real business development for active and intelligent packaging technologies, not just another series of workshops and panels. We are working with our members to build an industry,' he added.

AIPLA packed the agenda with more than 50 speakers, including representatives from Avery Dennison and Nestlé, offering an outlook on the latest developments and how these can be combined to offer complete solutions to brand owners.

More than 30 exhibitors from around the world were showcasing their latest innovations. Japanese company Toppan demonstrated how its expertise in security and packaging enables connected products as part of the digital transformation in packaging. By integrating an NFC label into every product, Toppan gives it a digital identity that facilitates connection to the internet and links to customers at every point of the product's journey. This enables authentication, traceability and consumer engagement.

'We now see a world in which brands, products and consumers are connected in new ways. By adding a digital identity to each product via its label, Toppan's solutions provide the protection, peace of mind, and added value that all stakeholders are looking for in today's market,' said Takuya Onuki, business development manager for Toppan's Security Products business.

Avery Dennison was showcasing a technology enabling brand owners to verify a food item's journey across the entire supply chain, from source to destination, and pinpoint any trouble spots along the way. The company works with Beefchain, the first company to place cattle into a blockchain, allowing consumers to track the steak on their plate all the way back to the ranch it was raised on. This gives ranchers greater control over the value of their sales by proving, via blockchain technology, that the beef they sell is what they claim to be.

The company's RFID division has released a portable RFID label-printing device that enables retailers and logistics providers to encode, print and apply an EPC UHF RFID tag to a product, cargo or asset. The Pathfinder 6059 was designed to make RFID tagging easier for those such as retailers and in logistics who might need to apply tags quickly on site, outside the manufacturing environment. The device is already available commercially and on test at five

"We now see a world in which brands, products and consumers are connected in new ways"

retailers around the world.

'As the use cases for RFID evolve and move forward, there have been some challenges. This is the first handheld device to scan a barcode, encode RFID, and print and apply an RFID label, all within less than five seconds,' says Ryan Yost, general manager of Avery Dennison's Printer Solutions Division.

Sustainability

One of the key topics at the congress was sustainability and the use of smart technologies to increase recyclability rates. 'In 2018 we launched our global commitment to achieve 100 percent of our packaging being recyclable or reusable by 2025,' said Robert Witik, who heads the Discovery and Innovation department at Nestlé. 'This year the we opened Institute of Packaging Sciences to accelerate the efforts to address functional, safe and environmentally friendly packaging solutions to market, and bring the global challenge of plastic packaging waste.'

Nestlé is working with technology start-ups to increase the value of flexible packaging to minimize the use of plastic in consumer product lines. One such example is Talkin' Things, involved in a Pack Neutral project. Both companies are cooperating to bring radio frequency and optical recognition technologies to packaging.

As per congress tradition, several technology start-ups were invited to pitch their projects, this time to healthcare specialist Abbott, which was looking for innovative ideas in digitally connected packaging for its rapidly developing and emerging markets.

On the second day, representatives from Coca-Cola listened to a series of pitches from innovators who responded to its challenge as to how smart packaging can contribute to new customers' recycling rates. The winners are yet to be revealed.



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The evolution of RR Donnelley

The multinational marketing and business communications company continues to evolve in a dynamic market. Chelsea McDougall reports

RR Donnelley (RRD) is often known as the company that once printed phone books, Sears catalogs and maps. That was before the internet, Amazon and Google Maps.

While those tech disruptors may have decimated some of the companies that RRD previously called customers, they didn't take down RRD. That's because there is a common denominator that RRD has employed over the years: a willingness to reinvent itself and evolve with the market.

This evolution also extends to RRD's global label and forms business, which had sales of approximately 750m USD in 2018.

“One of the things that differentiates us is that many of the same customers who are buying commercial print from us are also buying packaging, statements and forms, direct mail, and in-store retail solutions”

RRD is a Fortune 500 company established in 1864 and headquartered in Chicago. The company employs 39,500 people across 34 countries and had net sales of 6.8bn USD in 2018. RRD built its reputation in the commercial print market and in 2003 it acquired Moore Wallace, a move that thrust RRD into the label and forms market. Moore Wallace's CEO at the time told the Chicago Tribune: 'We print the phone bills and they print the phone book. This is the quintessential strategic deal.'

It wasn't the last pivot for the printing company. A decade ago, RRD shifted again to offer integrated marketing solutions. Today, the company is described as a 'provider of multichannel business communications services and marketing solutions.' And its labels business is an important part of that.

In the third quarter of 2019, RRD shareholders learned that the labels and packaging business growth was masked by declines in commercial print and industry-consistent softness in its logistics business.

RRD's label business, led by division president Bruce Hanson,

focuses mainly on durable, integrated form/label, variable image thermal transfer and linerless labels. It operates in primarily retail, distribution, logistics, pharma, medical device and industrial durables, RFID and NFC markets. The company has Domino and HP digital printing technology, flexo presses ranging from 10 to 20 inches wide, and letterpress and rotary flatbed screen capabilities. RRD has a presence in prime labeling, particularly with jobs on its digital assets.

'We've got a strong prime presence and strong digital production platform to support that type of work,' Hanson says. 'It's an area we do feel we have the right to play in and the ability to grow, but we want to do it right and add value to the right customers.'

Earlier this year, the company installed a second 26in linerless coating line from ETI in its Angola, Indiana facility. The installation expands RRD's linerless label production capacity, a 'core focus'.

More than labels

The company shifted a decade ago in the wake of tech disruptions to offer not just the printed products it built its legacy on, but also digital marketing services such as social media strategy and email campaigns.

Doug Ryan, president of RRD's marketing solutions business, told the Tech Blog Writer podcast: 'Historically RRD had to be good at handling large and sensitive data sets, we had to be good at executing large-scale personalization, we had to consistently find ways to execute programs more efficiently. So those general competencies were a natural platform to do more in the marketing services arena.'

Integrated print and digital offerings provide RRD with a competitive edge with the brands looking for a 'one-stop shop' and the companies looking to take advantage of its marketing support.

Hanson says: 'One of the things that differentiates RRD is that many of the same customers who are buying commercial print, are also buying packaging and statements and forms printed by us. Couple that with our marketing solutions, and it really makes buying from us easier for them – particularly at a time when so many companies are trying to rationalize their vendor base.'

'That's the foundation of what RRD has built over the years and what we will continue to build upon.'

RRD hosts engineering day for customers

RRD recently invited customers to its manufacturing facility in Milwaukee, Wisconsin for a day aimed at educating them about printed labels. Engineering Day showcased the latest insight on the industrial durables market, which makes up a large portion of RRD's business.

There were some 40 engineers in attendance. TLMi, Avery Dennison, UL and Domino offered presentations on material selection, durability testing and digital technology. Attendees also saw how labels were produced – a first for many in the group. 'Our engineering day was more about helping industrial engineers learn about the products we create that help them do their business,' says Hanson.



Bruce Hanson, labels and forms division president, addresses the crowd during an engineering day hosted at RRD's Milwaukee facility



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TLMI hosts 'disruption tour'

TLMI's Annual Meeting in Carlsbad, California, explored industry challenges. Chelsea McDougall reports

TLMi's annual meeting welcomed around 450 label industry leaders to what the association called its 'disruption tour.'

The theme of the two-day meeting of the North American label industry was evident in the keynote addresses, many of which focused on a major disruptor particularly for those in the label industry: sustainability. 'One main disruptor in our industry is sustainability and in order to tackle it we need to bring the tag and label industry together. We need to break down barriers and anticipated legislation, and outside forces that are shaking up the status quo,' said Nick Tucci of Avery Dennison, the host of this year's annual meeting.

Keynote speakers

Back by popular demand was economist Alan Beaulieu, of ITR Economics, who spoke about business management in an uncertain economy. Beaulieu said that the economy is showing signs of a slowdown headed into 2020 and he predicts at least three recessions in the next decade. Beaulieu said that will be a good time to sell or buy a business, noting that 'companies that prepare for a recession pull ahead during and after it.'

Beaulieu discussed many factors affecting the global and North American economy, including sustainability. He noted that world carbon dioxide emissions are getting better but added that the Green New Deal and other legislation aimed at tackling climate change 'has the potential for inflationary pressures and more federal debt.' 'If you want to go green, somebody's got to pay for that,' he said.

However, the contrasts of this much-discussed topic were driven home when the speaker immediately following Beaulieu addressed what the economists said. Dr John Izzo respectfully disagreed with Beaulieu's comments, saying climate change is the preeminent challenge facing the 21st century. It effects the air we breathe, the water we drink, the food we eat, he said.

'We have to reconcile that Millennials are a generation that see things differently. They prioritize sustainability. Sustainability is not a micro trend. And it's not just a metric to be studied by economists. This trend is not going away. You will either be in the way or be a leader in it.'



TLMI members including Craig Moreland and Art Yerecic at the TLMI Annual Meeting with colleagues including Chris Ellison, president of Finat

"There have been very few converter members who are as dedicated to TLMI as Lori Campbell has been over the past decade"

A third speaker, Daniel Esty, author of 'Green to Gold', focused his talk on sustainability and corporate responsibility. Esty detailed how companies can obtain what he called an 'eco-advantage' in the market. He said that operating a sustainability-focused business is not only good for the earth, but there can be process efficiencies and financial benefits too, particularly on social media and with investor and customer perceptions of one's company.

Terry Jones, the final speaker, calls himself a 'digital disruptor' as the founder of five start-ups, including Kayak and Travelocity. Jones told the audience that in order to be successful, they need to be on the front edge of change, whether they like it or not. 'If you don't like change, you're going to like irrelevance even less,' he said.

The TLMI Annual meeting also featured a product showcase exhibition where suppliers could showcase their latest technology, an awards dinner, committee meetings and a slate of networking events, including a beach clean-up.

Label converters and suppliers honored

Lori Campbell of The Label Printers was named converter of year at TLMI's annual meeting, where Patrick Potter for Flexo Wash was named supplier of the year.

The converter of the year award recognizes a member of the North American package printing industry who has made an extensive contribution to the greater market and demonstrated a commitment to TLMI. The supplier of the year award honors an individual for their ongoing volunteer service and dedication to TLMI and to the greater industry.

Campbell has been with the Label Printers for 37 years and recently was named the company's president. She is on the TLMI board and will serve as its chairwoman in October 2020.

TLMI president Dan Muenzer said: 'There have been very few converter members who are as dedicated to TLMI as Lori Campbell has been over the past decade. She has been instrumental in



L-R: Gabriel Ramirez and Luis Ricardo Marquez Geste from Multi-Color Corporation Mexico



Chad Aumick and Thomas Dahbura of Hub Labels, with John McDowell of McDowell Labels and Michael Ritter of ID Images and TLMI chairman

“One main disruptor is sustainability and in order to tackle it we need to bring the tag and label industry together”

building up and co-chairing the PrintThink Summit and has long been one of our hardest working board members. Lori is an exceptional collaborator and like many of the association's members, I feel extremely fortunate that I get to call her a business associate, a fellow industry member, and a friend.'

Patrick Potter has spent nearly seven years in the North American printing industry, following a career in the insurance and banking sectors. In early 2013, he joined Flexo Wash as the company's president. Flexo Wash is based in Louisville, Kentucky, and has over 4,000 installations in over 95 countries.

Outlook Group received the Calvin Frost Environmental Achievement Award and Diversified Labeling Solutions was honored for its sustainability efforts.

Outlook Group has achieved nearly 100 percent landfill avoidance and is committed to using suppliers that offer more sustainable products. Outlook offers a microliner product, which the company offers to help their customers with their own sustainability goals. The product enables Outlook's customers to decrease release liner waste by 80 percent and increases label volumes on rolls by 30-100 percent resulting in warehouse space reduction and lower transportation costs.

Diversified Labeling Solutions was given a special award for the company's excellence in recycling and landfill avoidance. The company's internal program requires all production personnel to change how they process waste within the plant. Previously, the company's waste was channeled to a large compactor. In the new program, all waste is separated and all matrix waste is compacted and rechanneled toward energy generation, replacing coal. The company's recyclable materials such as paper, plastics, metal, packaging film, pallets and corrugated are collected, separated and recycled in different recycling streams. The company's efforts have removed two million pounds of waste per year from landfills.



For more details on TLMI, its upcoming events and market research, visit, www.tlmi.com or follow on social media through the hashtag #LabelLeaders

TLMI Annual Awards

Narrow web converters submitted more than 200 entries for this year's TLMI Annual Awards, with winners announced at the annual meeting.

A panel of 15 judges, each representing a different TLMI supplier member, gathered near TLMI's headquarters in Cincinnati over the summer to examine all converter submissions and to ultimately award seven Best in Class entries and one Best in Show. Paul Teachout, VP of sales and marketing for Nilpeter, is the judging committee chair.

The best in show award was presented to Multi-Color Corporation for its 'Prayers of Sinners' prime label. The label was also awarded the best in class and first place honors in the offset – wine and spirits – color process – prime category.

The TLMI Annual Awards Competition honors best-in-class package printing in a range of print process categories including flexography, letterpress, offset, multi-process printing and digital. The non-pressure sensitive categories of unsupported roll labels and cut and stack are also represented.

Other best in class winners were:

- Digital: Multi-Color Corporation Mexico – Mi Campo
- Flexography or Letterpress: Labeltronix – Copper Wings IPA
- Flexography or Letterpress Wine & Spirits: Multi-Color Corporation – Freakshow Chardonnay
- Multi-Process: McDowell Label & Screen Printing – Athena
- Offset: Multi-Color Corporation North America – Prayers of Sinners
- Roll to Roll – Cut & Stack: Syracuse Label & Surround Printing – Gruvee
- Specialty: Yerecic Label – Explore the Flavors of Chef Curtis Stone



The best in show award was presented to Multi-Color Corporation for its 'Prayers of Sinners' label



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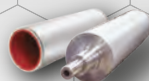
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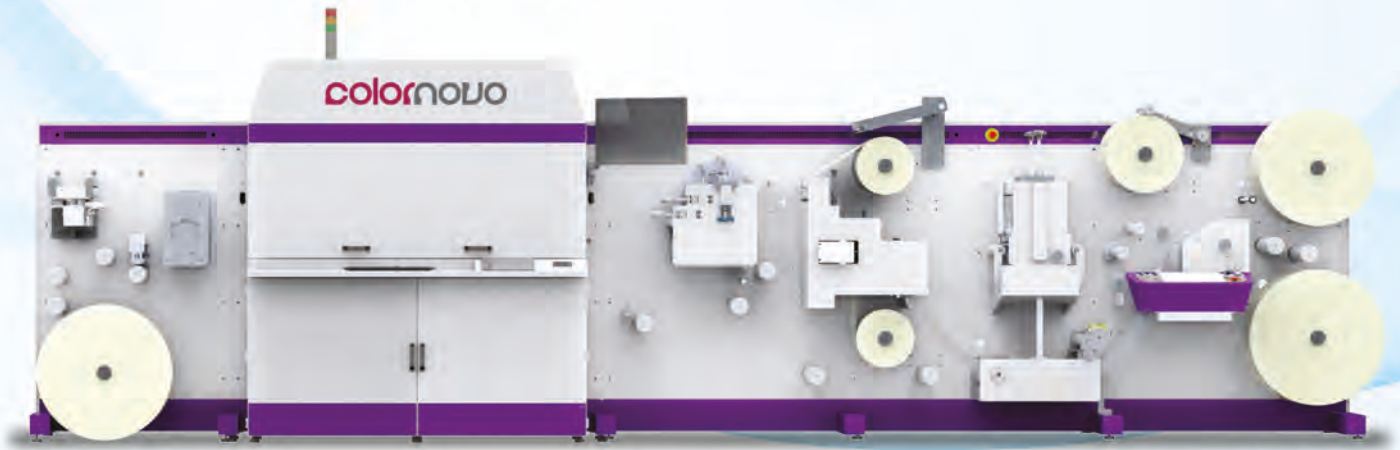
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India combats counterfeiting

The Authentication Forum brings latest anti-counterfeit challenges and solutions to spotlight, Aakriti Agarwal reports

The Authentication Forum, the annual event in Delhi organized by Authentication Solutions Providers Association (ASPA) and Messe Frankfurt India (MFI), addressed anti-counterfeiting and brand protection issues and effective strategies to combat the problem to protect brands, businesses and consumer rights.

The summit welcomed by 216 attendees including senior delegations from Pfizer, Godfrey Phillips India, Anand and Anand, Deloitte Touche Tohmatsu India, Indian Oil Corporation, Rusan Pharma, Securikett Ulrich & Horn, Umeeeka Packaging, Tesa Scribos, Secura Bangladesh, SICPA India, Vasu Healthcare, Matrix Technologies, Gopsons Papers, Modi Naturals, Gujarat Tea Processors & Packers, D D Packaging, ITC, Kezzler Hindustan, Rolling Optics, Optrical, Onspot Solutions, Mital International, and Bilcare Research, among others.

The recent edition of the Authentication Forum featured keynote presentations, panel discussions, open house interactions and networking sessions by notable international and national leaders from across the industry, policy makers, brand and packaging experts, authentication technology providers, consumer activists



ASPA members including Suresh Prabhakar Prabhu and Honourable Justice Manmohan Sarin inaugurating The Authentication Forum

“Representing 3.3 percent of world trade, counterfeiting is a critical risk for all companies”

and consumer organizations.

The seminar was inaugurated by Suresh Prabhakar Prabhu, India's Sherpa to G7 and G20 and former Union Minister, Government of India; and Honourable Justice Manmohan Sarin, former Lokayukta, NCT of Delhi, Chief Justice, High Court of Jammu and Kashmir and Judge, High Court of Delhi; and Nakul Pasricha, ASPA president.

Suresh Prabhu said: 'I am happy to see the commitment of the industry towards fighting counterfeiting. This forum is an assurance to the customer that his interest is protected and the quality which is promised will be delivered. We need to create a strong informed choice for customers and the government must play a crucial role by forming and implementing standards and guidelines to spread more awareness. It is important to engage with the customers, the government and other stakeholders by bringing them together for the same cause.'

Justice Manmohan Sarin said: 'It is recognized that counterfeiting, smuggling, and illicit trade reached high levels in 2016 and amounted to as much as 509 billion USD. Counterfeiting results in loss of jobs, curtailing the growth of industries. The potential of creating havoc in healthcare systems by spurious drugs can result in loss of human lives. Battling socio-economic crimes, such as counterfeiting, and infringement of trademark and copyright, need to be expedited on priority. The Authentication Forum and its members can play a significant role in providing low

cost, easy to use solutions for detecting counterfeit products from genuine ones.'

Nakul Pasricha, president of Authentication Solutions Providers Association, said: 'ASPA is trying its best to create awareness and support the government, industry and consumers in fighting counterfeiting and building authentic eco-systems in the country. We believe the leadership summit will empower the industry in fight against counterfeiting, the crime of the 21st century. We are enthusiastic to see the positive response and support from the government and industry in the fight against fakes. We are confident that this powerful stage for anti-counterfeiting will enable key decision makers at all levels to enhance their knowledge and to fight counterfeits.'

'Representing 3.3 percent of world trade, counterfeiting is a critical risk for all companies, no matter where they are, and what product they manufacture. The issue of counterfeiting and sub-standard products has been the cause of many major tragedies claiming human lives both worldwide and in India. Counterfeiting is a problem and with all of you industry captains and delegates, let us work together in combating counterfeiting and leading India in achieving a 5 trillion USD knowledge-based economy.'

Key findings by ASPA

ASPA released key findings of its report on counterfeiting in India, which revealed that the incident of counterfeit cases have increased by nearly 15 percent in 2019 for the period of January to October.

The top 10 sectors with highest number of counterfeit cases for 2018 and 2019 are currency followed by liquor, FMCG, pharmaceutical, documents, tobacco, automotive, construction material and chemical.

In terms of states, Uttar Pradesh (UP) is most affected by counterfeit goods, followed by Bihar, Rajasthan, Jharkhand, Madhya Pradesh, Delhi, West Bengal, Maharashtra, Punjab and Gujarat.

Other findings including:

- Approximately 25 percent of cases are reported from West Bengal and UP
- 65 percent of counterfeit liquor cases are from UP and Jharkhand
- Over 50 percent of food adulteration cases are from UP, Rajasthan and Punjab
- More than 50 percent cases of pharma counterfeiting are from UP and Bihar



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Bag making workshop in Yingcai

Environmental protection drives Guangdong Yingcai growth

One of China's biggest flexible packaging converters has thrown its doors open to competitors and suppliers to demonstrate how environmental protection and commercial success are linked. Yolanda Wang reports

In terms of production, Guangdong Yingcai Color Printing is one of the top three flexible packaging converters in Foshan, Guangdong province. But industry insiders and customers are getting to know the company more for its contributions to VOC emission treatment technology and environmental protection.

Indeed, Guangdong Yingcai is seen as a model enterprise for environmental protection and waste treatment in China's domestic flexible packaging industry, and recently invited representatives of flexible packaging converters from 35 provinces in China to learn from their experience.

Feng Fuqiang is founder and general manager of Guangdong Yingcai. He says the company has always been a pioneer in environmental protection. As early as 2012, Guangdong Yingcai had introduced solvent-free lamination technology from Sinomech Corporation and successfully overcome the difficulties in industrial-scale solvent-free vacuum metallizing and aluminum foil lamination. In addition, they mastered the key process of solvent-free lamination for oven-ready packaging. At present, all the flexible packaging products produced by Guangdong Yingcai use solvent-free lamination, significantly reducing overall VOC emissions.

At the end of 2012, Guangdong Yingcai held its first open house event to share this technology and experience with other flexible packaging companies with the assistance of Sinomech Corporation, as Feng Fuqiang proudly remembers: 'Driven by both of our efforts, Sinomech Corporation sold 80 solvent-free laminating machines in the next year and Guangdong Yingcai became one of the drafters of national standards for the solvent-free lamination process.'

Feng Fuqiang emphasizes that effective VOC emission control means looking at all aspects of the printing and production process. On the printing side, the VOC control system adopted by Guangdong Yingcai follows the catalytic cracking principle: warming first by natural gas to crack the VOCs emitted during the printing process under a high temperature of 600-700 deg C, which separates the VOCs into carbon dioxide and water. Currently the company is treating over 90 percent of its VOC emissions using this technology.

This VOC treatment process is also promoting energy saving throughout the company, as Feng Fuqiang explains. 'All the heat produced during the cracking reaction will be collected and used to meet the production requirements of the workshops by means of

"We need to completely change the public's impression that the printing industry is a heavy polluter. And this needs to start from one company at a time taking environmental protection as the top priority for future development. Only in this way can individual converters build their own core competitiveness"

a closed-loop heat recycling system, which could make us almost self-sufficient in terms of energy requirements.

'From a long-term development point of view, environmental protection and sustainable development will not impose a cost burden on our enterprise. On the contrary, social responsibility will bring to our company more premium brand customers.'

Feng Fuqiang has very clear views on the wider importance of environment protection. 'We need to completely change the public's impression that the printing industry is a heavy polluter. And this needs to start from one company at a time taking environmental protection as the top priority for future development. Only in this way can individual converters build their own core competitiveness.'

Feng Fuqiang has also sought to control VOCs from the company's downstream suppliers. As early as 2014 he was focusing on gravure ink. He opened a dialogue with technicians from gravure ink suppliers, allowing them to conduct field tests in his factory. 'However, gravure ink technology has still not matured in flexible packaging applications. Flexible packaging products are mainly made of laminated film materials which are easily deformed in the presence of heat, so drying of ink remains a big problem.'

Company history

Feng Fuqiang built Guangdong Yingcai from scratch, so understands



Printing workshop at Yingcai



Laminating workshop at Yingcai

“Gravure ink technology has still not matured in flexible packaging applications. Flexible packaging products are mainly made of laminated film materials which are easily deformed in the presence of heat, so drying of ink remains a big problem”

well the difficulties encountered in growing a company with an environmental focus. He divides the process into three stages.

1. Start-up from scratch

China entered the World Trade Organization in 2001, opening up its economy to both domestic and global competition. The industries in the Pearl River Delta, including the printing industries, were at the forefront of this process and faced unprecedented opportunities as well as new challenges.

‘There were huge market demands for flexible packaging products at that time. There were not so many competitors as now and profit rates were much higher,’ recalls Feng Fuqiang.

Feng Fuqiang raised 200,000 RMB (28,400 USD) that year and built a small company composed of eight people. ‘Funds were quite limited at that time and even the 100sqm workshop was rented.’ He recalls this time as a good experience. ‘We were using conventional manual equipment with quite low efficiency and a high dependence on operators’ experience and skills.’

As the market grew, by 2003 Guangdong Yingcai had expanded to nearly 50 employees and floor space increased ten times to more than 1,000sqm.

2. Acquisition and expansion

2007 was a milestone year in Guangdong Yingcai’s history. In 2007 the company had fixed assets exceeding 30 million RMB (4.25 million USD), but still didn’t own its workshop. Just as Feng Fuqiang was worrying about this, a perfect acquisition opportunity presented itself. After repeatedly weighing the possibilities, Feng Fuqiang raised 50 million RMB (7.1 million USD) and purchased the workshop, facilities and personnel in one package.

In 2008 Guangdong Yingcai moved all its existing facilities and employees to the new factory, at South Longsheng road, Shunde District, Foshan, Guangdong province – which is where Guangdong Yingcai is located today.

3. Scale development

Guangdong Yingcai then entered the scale-up development stage. The company purchased more accurate measurement equipment, including chromatography, tension and heat-seal instruments to control quality more strictly across all production processes.

They learned from the world class management model of Amcor

Flexibles and introduced an ERP management system, raising the automation level of the workshop and lowering time and labor cost penalties, substantially enhancing production efficiency and yield. They also replanned the workshop, dividing it into several independent operations such as film blowing, printing, laminating, curing, pouching and testing.

After years of retrofit and development, Guangdong Yingcai successively obtained its ISO9001:2015 quality management certification, QS Industry Manufacturing License and BRC certification. The company was repeatedly awarded regional and nationwide quality and ‘model enterprise’ awards for its aluminum foil composite film, aluminized composite film and food packaging and took up leadership positions in local Guangdong industry associations.

Today Guangdong Yingcai has nearly 300 employees with 2018 sales of 200 million RMB (28.42 million USD). Its products cover a wide range of end use applications including food, household chemicals, cosmetics, pet foods and infant and maternal goods. The company’s customers are spread across China and Europe, North America and Southeast Asia, with key accounts including L’Oreal, Carrefour, Liebe Baby, Garnier, JVR, Watsons, Be&Cheery, Wufangzhai and Bestore.

Future development

Feng Fuqiang concludes that, in general, the market demand for flexible packaging products is still increasing, particularly across the household chemicals and food – including pet food – sectors. ‘Brand owners and consumers increasingly prefer the easy shipping and storage of portable and light flexible packages. This undoubtedly will bring more opportunities for flexible packaging companies.’

‘But this doesn’t mean all flexible packaging companies will keep growing. Increasingly sophisticated market competition will push companies to upgrade constantly. Only by keeping a watchful eye on market trends and meeting market requirements can companies remain competitive and achieve a rapid growth in the future.’

This is the target Guangdong Yingcai continues striving to meet.



For more from Yolanda Wang on the Chinese market, go to www.labelsandlabeling.com/contributors/yolanda-wang

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In today's multi-channel retail environment, apparel items carry a range of labels and tags

The future of apparel labels

Piotr Wnuk reports on the biggest challenges and opportunities in the apparel label market

In today's multi-channel retail environment, apparel items carry a range of labels and tags, each fulfilling a unique and important function as well as presenting a series of challenges for the label industry.

According to a recent Global Info Research study, the worldwide market for fashion and apparel print labels is expected to grow at a CAGR of 7.1 percent over the next five years. It is forecast to reach 2,970 million USD in 2024, from 1,970m USD in 2019.

The positive forecast for the apparel label market brings significant interest from the printing industry. Both equipment manufacturers and converters are looking to innovate and follow recent trends, which are presenting several challenges but also offer significant opportunities.

The apparel label industry is complex. Not only does a label establish a clothing and brand identity, it also gives instructions that help the customer care for the garment after purchase. Clothes labeling is so important, in fact, that consumer protection agencies around the world have stringent care labeling requirements. In addition independent organizations such as the International Organization for Standardization (ISO) have their own labeling requirements that companies must follow if they wish to receive certification.

Challenges

Multiple factors shape the apparel label market's production lines and its competitiveness. 'It really comes down to what I call the Amazon effect,' says Ken Moir, VP of marketing at NiceLabel. 'Today, fashion increasingly has to be fast. Businesses in this space need to be agile. They can no longer afford to spend too much time moving items out of store and reticketing or retagging them.'

According to Moir, to retain customers and build competitive edge, businesses must move instantly and make their products available to purchase on the market in as short time as possible. 'Many of the established brands are struggling with the

omni-channel route to market. In the apparel market one out of three purchased products is returned. Managing these returns, keeping costs down and the speed of refurbishing all make a dramatic difference to the bottom line and customer experience,' adds Moir.

"Today, fashion increasingly has to be fast. Businesses in this space need to be agile. They can no longer afford to spend too much time moving items out of store and reticketing or retagging them"

Checkpoint, a division of CCL Industries and an innovator in the RFID field, sees digitalization and the need for sustainable solutions as the two big challenges in the apparel and textile label market. While these are positive movements, both are driving substantial change within the industry and so producers and brands must stay ahead of the curve.

With concepts such as circular fashion starting to take off, businesses are becoming more environmentally aware, and are letting their customers know about it. Changing clothing labels to reaffirm the company's commitment to sustainability boosts its reputation, not only with customers but also with potential employees.

'The question of how we can make our products more sustainable and more circular is at the center of the work we do. For example, we are working on reducing the weight of our products, and increasing the content of recycled materials, as well

as offering a solution where scrap is taken from our process and reprocessed into a yarn that we can then incorporate into our solutions going forward. We are also looking at ways that our digital solutions can enable recycling of garments,' says Michael Colarossi, vice president of innovation, product line management and sustainability for apparel solutions at Avery Dennison.

Avery Dennison has an influence that extends throughout the supply chain to champion issues of sustainability. From ensuring that its suppliers and the organizations it works with are abiding by the highest standards from a social and environmental perspective, Avery Dennison ensures it is driving the right behavior in the industry.

'As one of the largest players in the apparel space, we have an obligation to continue to act as a force for good, and work with our communities, suppliers, brands and retailers to drive this idea of sustainability,' says Colarossi.

Also following this trend is thermal transfer ribbon manufacturer Armor. 'We are testing a new program in France where we collect the ribbons at the user site and provide a certificate of recyclability. We send the waste created by using our ribbons to generate energy. The program is now operational in France and we are working on case by case examples to make sure we align with local legislation,' says Pierre-Arnaud Hommel, communications manager at Armor.

According to Armor, one of the market challenges is introduction of sustainable fabric label materials. 'These label materials will be biodegradable, recycled, recyclable or organic compostable. And, of course, they should not affect our population: for example, corn-based material shouldn't affect our resources, but should also be safe when in contact with human skin,' says Hommel. 'Within the range of 10 fabric label materials that Armor recently introduced in Europe, we have integrated a recycled yarns solution to respond to growing sustainable initiatives.'

Fabric labels are increasingly a central component in the logistics, marketing and selling processes of textile products.

'We are committed to reducing our environmental impact and protecting the health, safety and well-being of both our employees and the communities in which we work in around the world,' comments Erik Cardinaal, vice president and general manager of Apparel Labeling Solutions for EMEA and Americas at Checkpoint. 'We aim to support the United Nations Sustainable Development Goals in every part of our business and pro-actively assist our customers to meet their own sustainability goals.'



The adoption of smart technologies creates opportunities across the supply chain

“An RFID-enabled apparel label can provide multiple benefits to retailers, including asset tracking and product authentication. Stores that have adopted the technology are able to count inventory quicker and improve stock accuracy”

Opportunities

'Although both digitalization and sustainability can be seen as challenges, these two industry-wide shifts also present the biggest opportunities for positive market transformation. Checkpoint is vertically integrated to help retailers move and consumers connect with a digital world,' says Cardinaal.

According to the company, another opportunity is being created by the growing number of global retailers adopting RFID. Although this technology has been around for many years, as the cost of producing the inlays falls and potential return on investment becomes more evident, there will undoubtedly be more brands looking at adopting RFID in the future.

'The reason for this is simple, an RFID-enabled apparel label can provide multiple benefits to retailers, including asset tracking and product authentication. Stores that have adopted the technology are able to count inventory quicker and improve their stock accuracy. Ultimately, they can avoid costly out-of-stock scenarios and improve customer experience, which is vital in today's retail industry,' adds Cardinaal.

Labels that provide more than simple product information are becoming increasingly sought after by retailers, whether to improve inventory accuracy or help tackle theft, suppliers that deliver intelligent labels to their customers are well placed for success.

According to NiceLabel, one opportunity

lies in being agile, quickly reacting to changing consumer behavior and digitalizing the processes accordingly.

'The opportunity is about being able to reticket and retag where and when you need to. Retailers and suppliers that can do that and help deliver the product in as near real-time as possible will achieve a competitive advantage. Cloud solutions can help here too, enabling suppliers to do the original master ticketing and tagging, thereby helping eliminate the need for reticketing and retagging further down the supply chain, and further accelerating the delivery of the product,' says Moir.

Smart technology

Across all technology types, an IDTechEx report predicts that growth areas for RFID will include apparel tagging. Just since the beginning of this year this technology has been used in over 10 billion labels, despite low market penetration reaching only 10 percent. To put this in context, contactless cards, which were considered as a major use for RFID tags, have been used in just 2.3 billion cards in the same period.

'Our RFID and Janela solution is a digital knowledge base that provides information about specific items along the supply chain, which allows for a very efficient and accurate way of improving the visibility from the moment an item is created, through to its journey on the supply chain, all the way through to retail and eventually with the consumer in their home,' says

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Global RFID adoption accelerates in apparel retail

Two out of three of the top 30 retailers in the US are making use of RFID, ensuring inventory accuracy and facilitating success in the retail and apparel industry.

The acceleration of global RFID adoption by retailers was the focus of a Big Ideas panel session hosted by Avery Dennison Retail Branding and Information Solutions (RBIS) at the recent National Retail Federation's 103rd annual convention and exhibition.

The Big Ideas panel, moderated by Mark Roberti, editor of RFID Journal, featured industry experts including Francisco Melo, Avery Dennison RBIS vice-president of global RFID, and Dr Bill Hardgrave, dean of the Harbert College of Business at Auburn University and the founder of the RFID Research Center.

'We're seeing a significant number of retailers piloting and adopting RFID around the world,' said Melo. 'This is due to the return on investment RFID delivers, its ability to significantly improve inventory accuracy and the simplification of implementation.'

Francisco Melo, vice president and general manager, global RFID at Avery Dennison.

NiceLabel sees smart technologies increasingly integrating with the label market and driving it forward. 'More retailers are managing the inherent complexity themselves, designing ticket tags to support RFID, and then through technologies like cloud and processes like centralization, making it easy for their suppliers to



Avery Dennison's RFID and Janela technology provides information about specific items along the supply chain

adopt them,' says Moir.

Armor AXR TX thermal transfer textile ribbon is already able to print QR codes for its clients and the company currently investigates new options and technologies. It uses QR codes on its own products. 'Even with the increased use of smart labels, printing identification and traceability data will remain a key challenge: it will always be necessary to provide readable (or scannable) data to consumers and to all members of the supply chain. For variable data, thermal transfer printing is one of the most efficient, simple and competitive technologies,' says Hommel.

'We believe that smart technologies, such as RFID, are becoming more important to retailers,' says Cardinaal. 'Over the coming years,

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“I expect to see the market increasingly adopt cloud and rapidly move to innovative new approaches such as RFID”

they will integrate into the label market. We see this as a natural progression. In the past, we have seen the evolution of barcodes and now we are seeing the use of smart labels, but this time at a much higher pick-up. Smart labels have a number of direct advantages including inventory accuracy, financial improvement and customer satisfaction.’

The future

‘The apparel and garment sectors are two of the most forward-looking when it comes to labeling,’ says Moir. ‘I expect to see the market increasingly adopt cloud and rapidly move to innovative new approaches such as RFID. In line with this, I anticipate that in the future all reticketing and retagging will be done on a smaller scale, closer to the customer: in store or in the distribution center processing online purchases.

‘That does not mean that traditional printing bureaus will die – some label printing jobs are on such a large scale that they will continue to be needed – but even these bureaus will over time need to adopt cloud labeling solutions. In short, cloud is going to be used more and more for ticketing and tagging but it is also increasingly going to be a solution for suppliers.’

Specialists from Checkpoint think that with the need for more



Apparel RFID branding label from China-based Huayuan

environmentally friendly solutions, there will be changes in the use of current materials and production methods that will also result in the enabling of more advanced and intelligent labels.

‘The target of smart garment labels is to use big data to create a personalized product experience,’ comments Hommel. ‘For consumers, the trend is no longer to purchase in retail stores. These physical stores are becoming “experience centers” for later sales on the internet. So product data, consumer digital data and physical contact in stores will allow the creation of a fully customized sales experience: starting from product, habits, budget and colors.’



Turn the page to read about the use of Avery Dennison's Janela technology in Polo Ralph Lauren's collection

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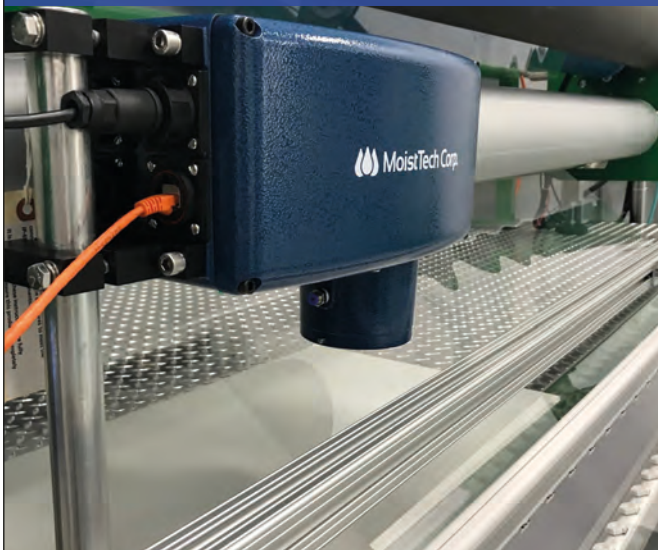
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Clothing's digital ID card

Over the next three years, Avery Dennison aims to digitize 10 billion apparel and footwear products, enabling unique consumer experiences by giving clothes a digital ID in the form of a textile label. Piotr Wnuk reports



Ralph Lauren is one of the first brands to adopt the digital identity technology on a large scale

Imagine you find a pair of jeans in your favorite store. Imagine those jeans have a unique serial number given to them at the time of manufacture. They are born in the digital world. You reach for your smartphone, scan the digital ID found on the label, and learn about where the jeans were made, read consumer reviews and see if your size is available in the store. The circle closes after the purchase, when you can submit your own review, gain loyalty points and receive brand content tailored to your preferences.

The future is already here. Avery Dennison's Janela technology, powered by the Evrythng Smart Products Platform, tracks each of these consumer interactions to provide brand and retail partners with valuable data and analytics.

'With the smartphone becoming the remote control for the physical world, Janela transforms the 1:1 conversation between the brand and the consumer by merging the physical product to the digital interaction, providing a new frontier for brand dialogue and personalization,' says Kim Schneider, senior director of Technology Solutions, Avery Dennison RBIS. 'This unique relationship between Avery Dennison's hardware, data and world-class manufacturing and Evrythng's IoT software technology represents a truly industrial-scale digital enablement of everyday products. Moreover, Janela enables apparel and footwear brands to easily deliver digital applications with their physical products.'

'The Janela Smart Products Platform helps apparel and footwear brands digitize their products to drive consumer engagement. By marking apparel and footwear products with a unique, serialized identity which then connects to Evrythng's IoT cloud-based software, Janela creates the ability for brands and retailers to capture real-time data, enhance consumer

experiences, and drive proactive marketing campaigns unique to every product and consumer. This "digital identity" also enables product registration, supports returns and reorders, and facilitates brand protection and product authentication. Through this and more, Janela makes the manufacturing and selling of products more efficient and intelligent.

"With the smartphone becoming the remote control for the physical world, Janela transforms the conversation between brand and consumer"

'Through data capture, Janela also offers brands the opportunity to customize content and drive ongoing engagement. Janela gives brands the ability to tell their story, share transparent information like where a product is made and who made it, and encourage brand loyalty through offers, discounts, points and new products. Brands can also develop organic, customizable content on the platform to keep consumers engaged.'

Personalized relationship

One of the first brands to adopt the digital identity technology on a large scale is Ralph Lauren Corporation (RLC). The company has already applied it to tens of millions of products, starting with the Polo brand.

Ralph Lauren's Digital Product IDs give consumers the reassurance of authenticity paired with a connected product experience. By scanning the product label with a

smartphone, consumers can also learn about the product detail and receive styling tips and recommendations. New features are continually being explored to unlock the full potential of this technology and build a stronger, more personalized relationship between RLC and its consumers.

'The launch of Digital Product IDs demonstrates how we continue to use technology to deliver more for our consumers and ensure the integrity of our products throughout their lifecycle,' says David Lauren, chief innovation officer at RLC. 'The application of this technology means every Polo product will be "born digital" which represents a new milestone in data intelligence innovation in our sector.'

In addition to authentication, creating unique digital identities for each product enables a variety of applications, including increased connectivity for consumers who can scan the QR code to receive additional product details and styling recommendations. Across the supply chain, the IDs enable real-time visibility to track products from the point of manufacture and improve inventory management.'

'While we cannot disclose the specifics at this time, Janela creates greater sales and engagement with consumers by delivering a seamless and customizable experience for users,' adds Schneider. 'The implementation of this technology will also give retailers and brands a more targeted and personalized approach to reach their customers. The application of IoT is increasingly expanding and with a projected worth of 14.4 trillion USD by 2020. IoT represents a business opportunity which can provide companies with a distinct competitive advantage.'

Niall Murphy, CEO and co-founder at Evrythng, adds: 'The fact that at least 10 billion Avery Dennison RBIS products will be digitized at the point of manufacture is both a milestone in making the IoT mainstream and a huge enabler for the apparel and footwear industry. Avery Dennison works with some of the world's largest and most respected consumer brands. Evrythng and Avery Dennison RBIS are enabling products for these brands to be "born digital" and create new value with IoT applications, which is a huge opportunity for the industry.'



See previous article for more on apparel labels

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Making your label stand out from the crowd

Attractive labels can grab the attention of consumers. But what can make them hover a little longer – and convince them to make the buying decision – is the fantastic finishing effects available to the label converter. Tony White reports

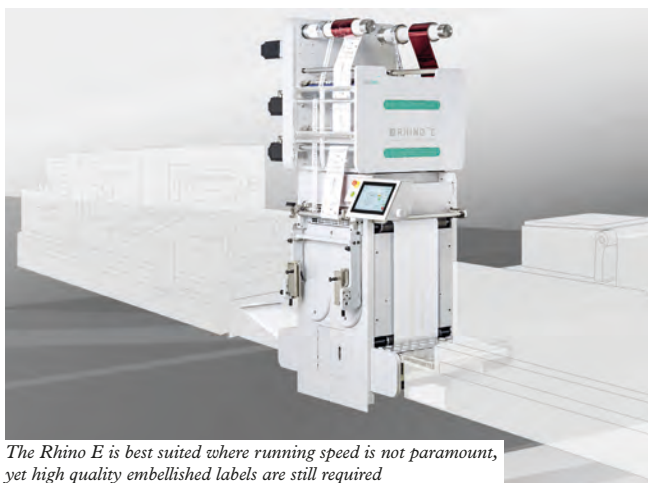
What does it take to ensure that your brand's label rise above the rest on the retailer's shelf? There are many very attractive labels being produced by highly skilled label converters which, on their own, grab the attention of the customer. But what makes the prospective purchaser hover that little bit longer (and convince them to make the buying decision) is the fantastic finishing effects which are currently available to the label converter.

In this article, we hear from three companies very much involved in helping label converters to achieve that little bit extra when it comes to adding value to the label. We will see that foiling can add that extra sparkle to the label, embossing can give the label depth and micro-embossing can add a layer of security to expensive products. Finishing can project a product from the 'also rans' to the exceptional.

Has flatbed got the answer?

The market for high value consumer goods such as wine and spirits requires more and more highly embellished label designs. Contemporary approaches range from exquisite single foil to complex multi foil designs which result in labels which attract buyers' attention and assign a high value to the underlying product. This means that they are an essential cornerstone for the success of the brand owner. With the efficiency and versatility of flatbed technology, converters are provided with a powerful tool to offer outstanding labels for high-quality consumer goods at a low additional cost.

Rotary hot and cold foil stamping are well established in the self-adhesive label industry. Rotary in-line stamping achieves satisfactory results on closed surfaces. When it comes to open substrates as those used for wine and spirits, the disadvantages are obvious. Cold foil adhesive is absorbed by the material; hot foil stamping is considerably slowed down on rough materials. If relief embossing is carried out subsequently, part of the gloss is lost and the relief height is comparatively limited. Finally, attaching several foils requires several machine runs.



The Rhino E is best suited where running speed is not paramount, yet high quality embellished labels are still required

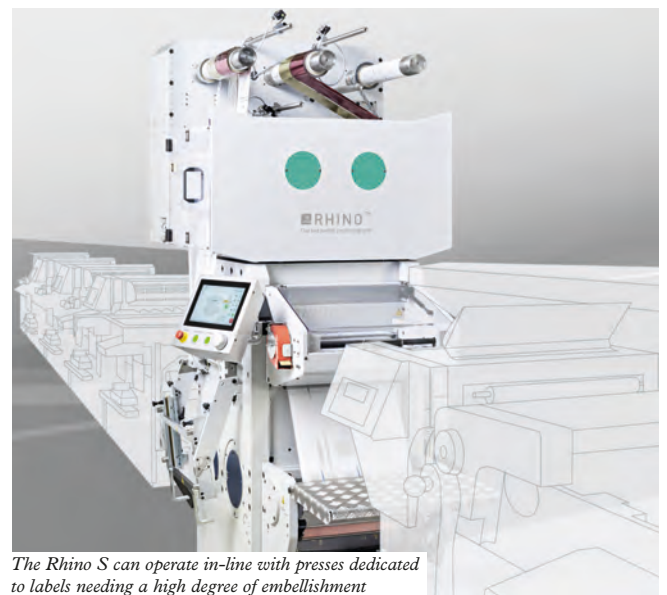
"Finishing can project a product from the 'also rans' to the exceptional"

The solution is flatbed embossing. For foil transfer from carrier tape to substrate, the contact time is more than seven times longer with flatbed stamping systems than with rotary and even more with semi-rotary systems. The energy utilization increases, and less expensive and slower transferring foils can be used. Providing a revolvable head is used, flatbed systems can also place several foils across the web. A robust in-line flatbed stamping system such as the Pantec Rhino achieves high relief height, extraordinary brilliance and perfect register accuracy of the embossing relief.

Multi-foiling and registered foils for outstanding designs

Lenses, 3D spatial effects and holographic foils are among the latest developments in label and packaging design. These unlock completely new design possibilities but only work if applied in perfect register. Multi-stroke systems allow the application of several foils in one machine run in perfect register. Pantec's Rhino for example enables the application of different foils in register using one tool. It's even possible to emboss the substrate itself or only the foil to enhance its effect. These are some of the effects that can be used to gain the consumer's attention.

With holographic foils and their subsequent optical effects, labels will stand out even more. The transparent design of the lenses makes it possible to superimpose image motifs, colors or logos with a unique holographic depth. In order for the optical effects provided by these new technologies to have an influence on the packaging or label, the lenses must be positioned exactly in register above the motif.



The Rhino S can operate in-line with presses dedicated to labels needing a high degree of embellishment

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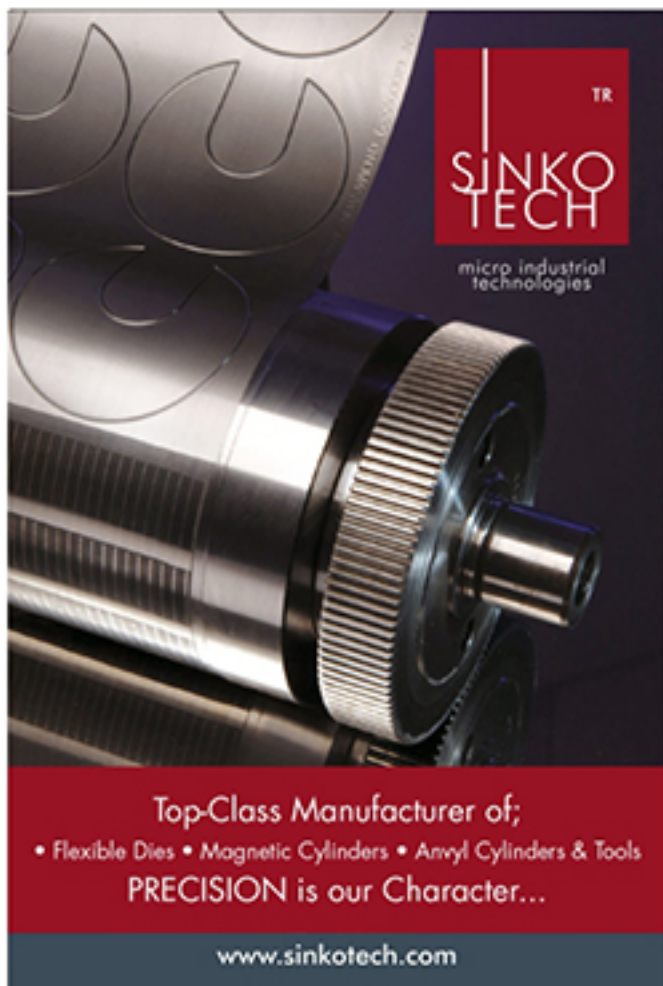
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“The continuing trend to maximize design possibilities is evident in the ever-increasing number of products that are finished with stamping foils”

For brand owners, embellishment is an invaluable opportunity to better position their products on the supermarket shelf. Nevertheless, they are often quite hesitant if these refinements entail substantial additional costs.

The only objection that can be levelled in this case is 'at only extra cost', as propagated for example by Pantec. This is made possible by systems that work with efficient materials (= foils), cost-efficient flatbed tools, which can be integrated into existing processes without restrictions according to speed or job change time.

In 2010, Pantec turned the label world upside down with the introduction of the Rhino flatbed system. A high-stroke frequency system suddenly opened up in-line label finishing and gave high-end converters an incredible productivity boost.

The Rhino S is capable of running at up to 30,000 strokes per hour and fully capable of operating in-line with printing presses dedicated to producing labels with a high degree of embellishment. Today, more than 150 systems are operating worldwide, mostly in an in-line configuration.



Flat hot stamping



Relief hot stamping

The Rhino E completes the Pantec narrow web portfolio and is optimized for less complex labels and the refining of digitally printed labels.

Hot stamping

Hot stamping offers a diversity of design options for ensuring the attractive presentation of products through appealing packaging. The continuing trend to maximize design possibilities is evident in the ever-increasing number of products that are finished with stamping foils.

The unique color effects originate primarily from the various coatings on the stamping foil. These effects, in particular metallic and holographic, are not easily achieved with other printing methods which use printing inks or lacquers. How else could realistic representations of metals such as gold, silver, copper, brass, bronze, stainless steel, chrome, anodized aluminum with a mirrored, polished, brushed satin, sand blasted, matte, satin-gloss or extremely matte finish be achieved?

Holographic hot stamping foils exhibit three-dimensional effects, allow virtual animations to be created, and produce color movement effects as the direction of the viewing angle changes.

Further design possibilities are offered by hot stamping foils with bronze/metallic effects, pearlescent effects, transparent or transparently-colored, high gloss finishes, or plain opaque color effect foils with an elegant matte surface.

The ability to overprint stamping foils in multiple colors using translucent inks in a subsequent printing process, whether by offset, flexographic, silk-screen or gravure printing, creates further design possibilities as can the stamping die.

Flat hot stamping is the most widely prevalent form of hot stamping, and the one in which the purely visual effect of the hot stamping foils is shown to the greatest advantage. In the example shown pictured the transfer appears to lie in the same plane as the print substrate, but is always slightly recessed due to the required stamping pressure.

In addition to the flat transfer of stamping foil, it is also possible



Micro embossing



Cartes' GT360 is a fully modular and versatile machine

to three-dimensionally crimp the substrate by means of relief embossing. This not only enhances the viewer's perception in a purely visual sense, but also achieves an additional communication element on account of its tactile facility. Tactile sensations have the second highest intensity, after visual stimuli, in the selection process involved in human perception.

In addition to the tactile effect, detail-rich reliefs become highly attractive design elements, for example when Kurz metallic Luxor/Alufin hot stamping foils are used. The high metallic luster of Kurz stamping foils also highlights the different height levels and interplay of the relief structures.

Very fine structures in the stamping die distort the foiled surface of the stamping substrate and create impressive reflective effects. Micro embossing is mostly achieved without a counter die and can be combined with all types of stamping dies (flat, emboss, and combination dies).

Nano embossing, the most recent development of Hinderer + Mühlich, enables the creation of 40 percent finer textures than micro embossing. This opens up almost endless design possibilities, such as matte/glossy combinations, satin finishes, crystal clear flip flop effects, improved security features, real brushed designs, and photographic effects.

With the stamping die manufacturing technologies available today, it is possible to implement any combination of the effects described above in a single stamping die.

Adding value to the label

As we have seen, there are number of enhancements which converters can add to labeling and packaging to provide decorative value and functionality to the surface of a label.

Nowadays the most common forms of label embellishment are hot foiling, embossing, and special effects with inks, varnishes and many others.

The flat foil stamping process is a

“In addition to the tactile effect, detail-rich reliefs become highly attractive design elements”

premium process that can be used on printed labels to add the perception of luxury. Italy-based Cartes has historically been producing finishing machines for this process for the reel-to-reel label market, typically the GT360 series of machines.

The Cartes flatbed hot stamping unit is mainly used for the dry printing process which uses heat, foil and pressure to transfer the image from the foil by means of a metal (brass, copper, magnesium) die onto a label substrate. Foil stamping is an incredibly versatile process that allows the converter to explore imaging on different surfaces where conventional printing techniques cannot be applied.

Thanks to the multi-foil feeding systems (two in transversal and one in longitudinal direction) and multi-step regulation, the printing/embossing process can be done at full speed, in a single pass. If the design is properly structured, the hot stamping process can be combined with embossing, even with multiple foil colors (different finishes and effects like imitation leather, wood grain, marble, holograms, pigments, matte and gloss foils).

Sometimes no foil is used for the actual embossing process to produce an embossed or de-bossed element on the label surface. The process involves the application of high pressure, which forces the male relief image into the female recessed image on the face side of the label substrate and is regulated by four centesimal gauges to ease the pressure set-up.

In addition to cold embossing, the hot foiling process can be combined with the application of a metallic foil over a special varnish to achieve a new and unique relief effect, which is also known as metallic doming.

To achieve a raised tactile effect, a varnish is applied using a flat silkscreen

printing unit followed by curing using a powerful UV curing unit. A thermo-active metallic foil is then laminated over the relief image. With the silkscreen printing unit it is also possible to achieve very elegant simple decorative effects with the use of gloss or matte varnishes on any type of paper or film surface.

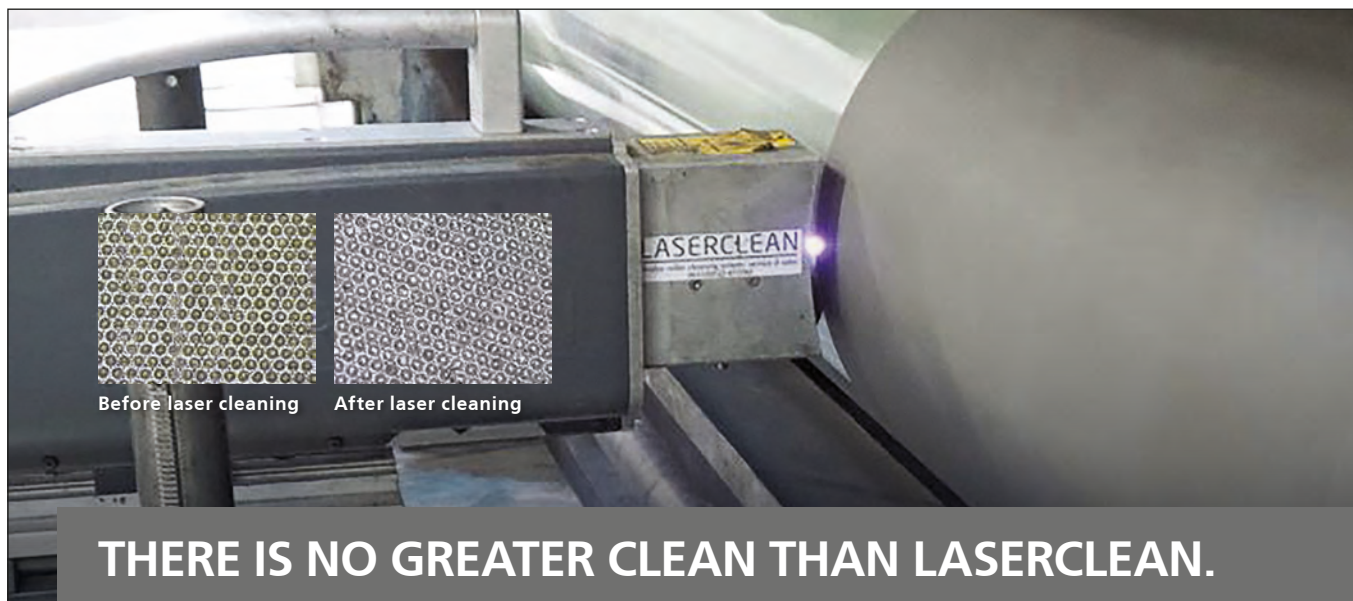
Cartes' GT360 is a fully modular and versatile machine which can be equipped with hot foil stamping, embossing, silkscreen printing, flexo varnishing, laser converting and semi-rotary or flatbed die-cutting. The machines are equipped with a Multi Head Positioning System (MHPS) which automatically corrects the position of each operating unit to ensure the best possible registration. Other applications which can be added to the GT360 include the possibility of printing Braille and metallic doming, hologram application and UV lamination, among others.

Cartes can add laser die-cutting to its inventory of modular devices, more recently the Invisible Laser Cutting (ILC) technique, which when cutting labels printed in dark colors avoids the unsightly 'white edge' result. The ILC system offers very few limitations when processing extremely thin liners including films or linerless materials such as in-mold labels. The mechanical strength and adjustments available on each machine, guarantees high precision on the most complex and elaborate jobs and make it possible to obtain high quality labels.

All these techniques mentioned are the most cost-effective ways of adding a distinctive elegance and additional value to any label substrate.



For more from Tony White, go to www.labelsandlabeling.com/contributors/tony-white



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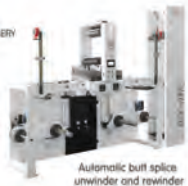


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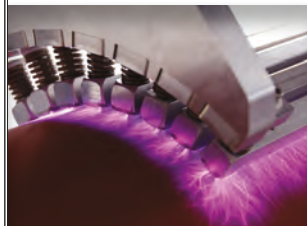


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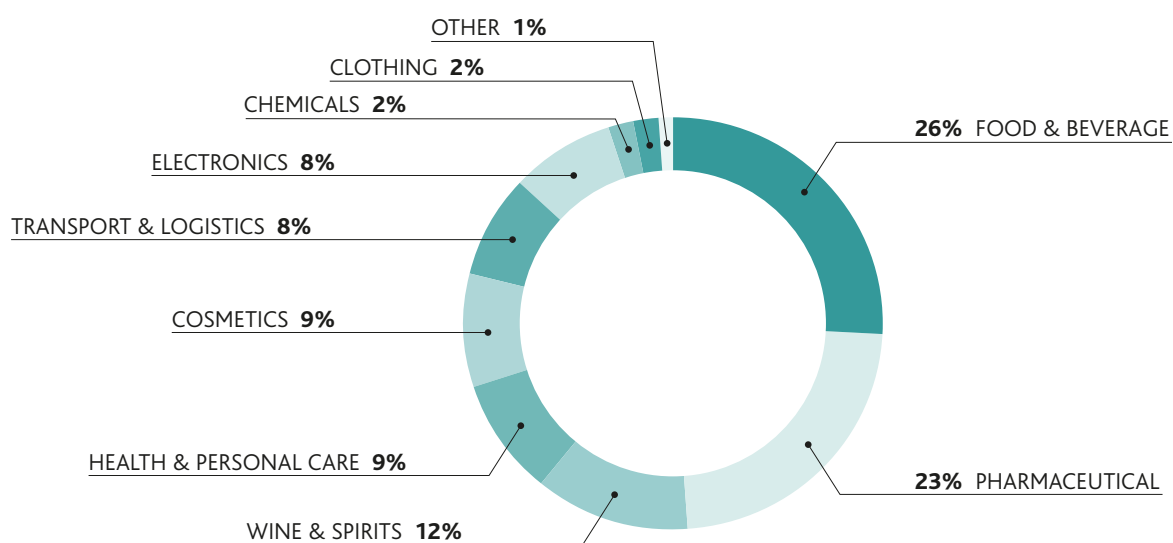
Label trends

Focus on the Chinese label market: value, growth and biggest end use sectors
















Chinese label printing industry

	2015		2016		2017		2018	
	VALUE	GROWTH RATE	VALUE	GROWTH RATE	VALUE	GROWTH RATE	VALUE	GROWTH RATE
Total output value of Chinese label printing industry (billion, RMB)	36	9%	39.2	8%	43.2	10%	46.8	8.5%
Total label production volume (billion sqm)	4.8	9%	5.2	8%	5.8	12%	6.4	10%

Chinese label market breakdown by segment 2018



Top five label segments

	2016	2017	2018
No. 1	 FOOD & BEVERAGE	 FOOD & BEVERAGE	 FOOD & BEVERAGE
No. 2	 PHARMACEUTICAL	 PHARMACEUTICAL	 PHARMACEUTICAL
No. 3	 WINE & SPIRITS	 COSMETICS	 WINE & SPIRITS
No. 4	 ELECTRONICS	 WINE & SPIRITS / ELECTRONICS	 HEALTH & PERSONAL CARE
No. 5	 HEALTH & PERSONAL CARE	 HEALTH & PERSONAL CARE	 COSMETICS

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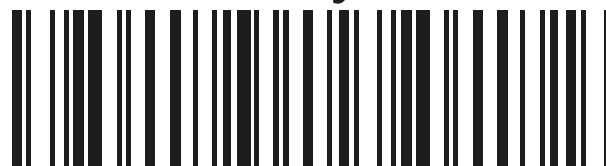
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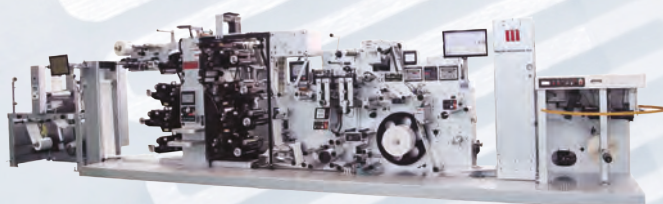
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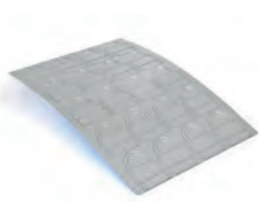


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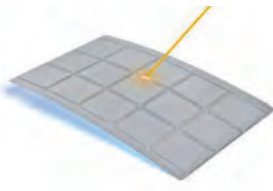
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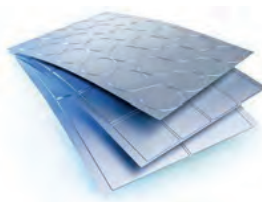
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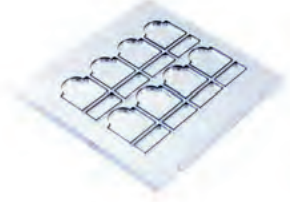
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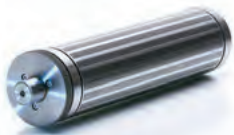
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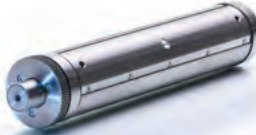
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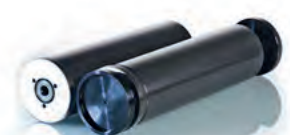
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