

2020 IN REVIEW

L&L's global team looks back on a unique year

— EST 1978 —

LABELS & LABELING

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2021 PREDICTIONS

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Sophisticated functionality in hostile environments

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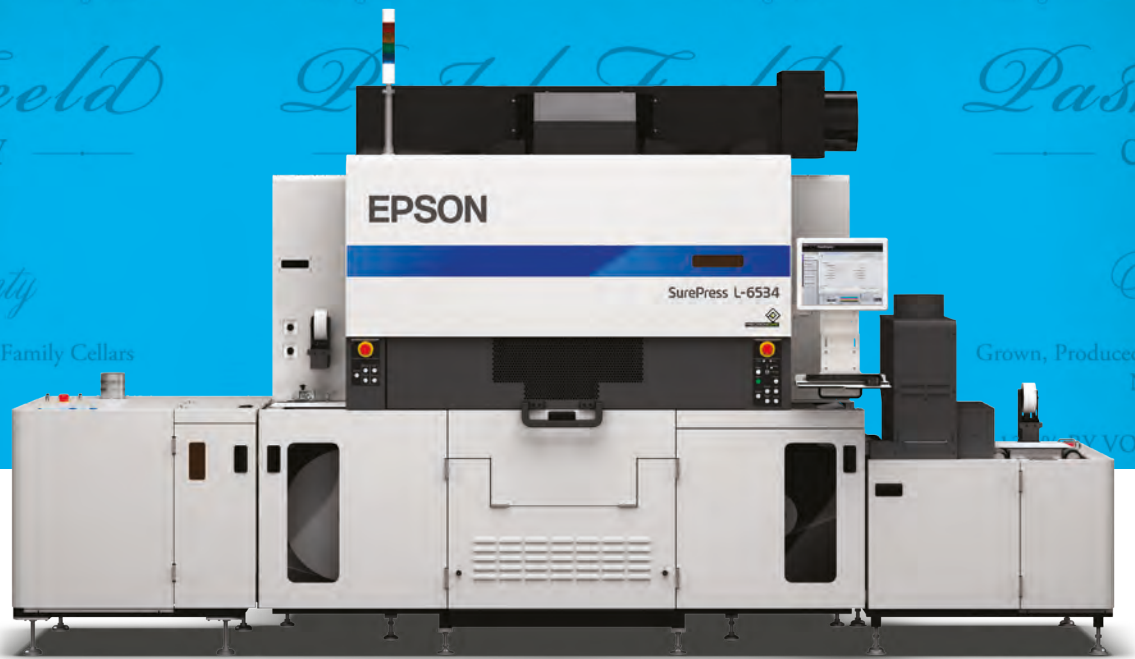
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L&L

– 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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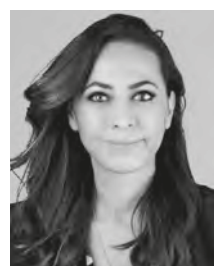
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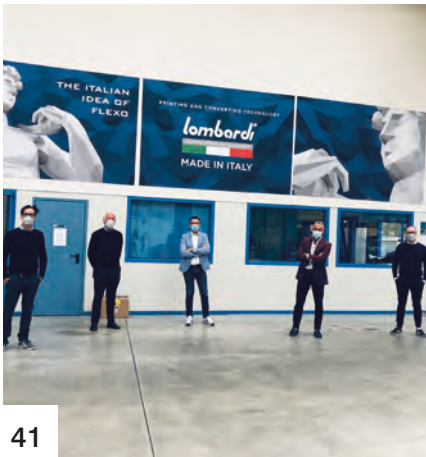
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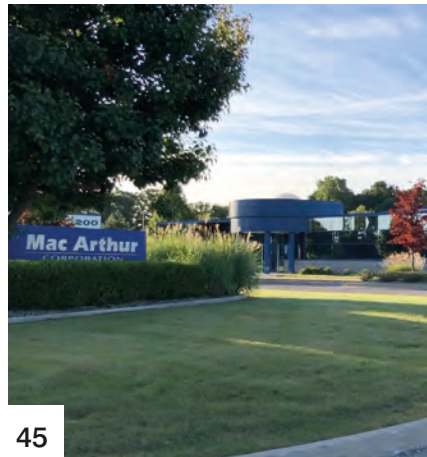
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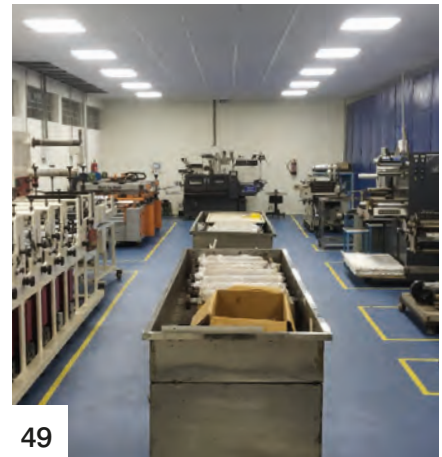
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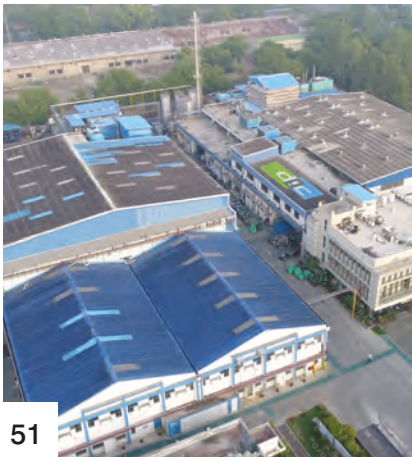
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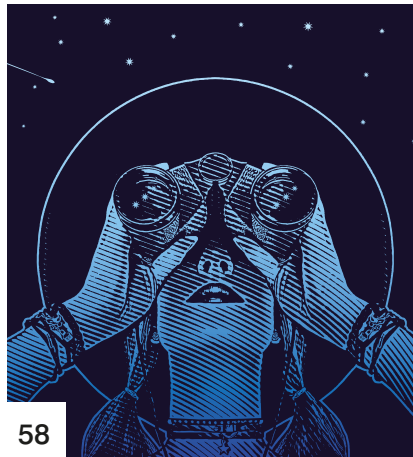
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Covid-19 forced many label converters and suppliers to examine their operations. Michigan-based MacArthur Corporation took a smart and measured approach
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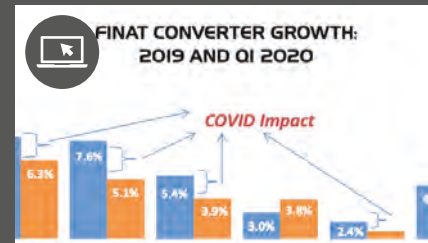
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Yulong Printing is color matching between digital and conventional presses to deliver packaging buyers a one-stop shop experience

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Key trends affecting the European label industry



2020 Label Industry Global Awards
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Special video celebrating this year's recipients



Read L&L issue 5 online (magazine)

Previous issue of L&L is now available to read online



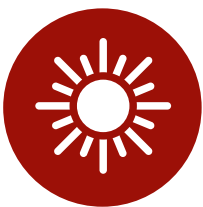
Middle East round table session
(video)

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Smart and connected



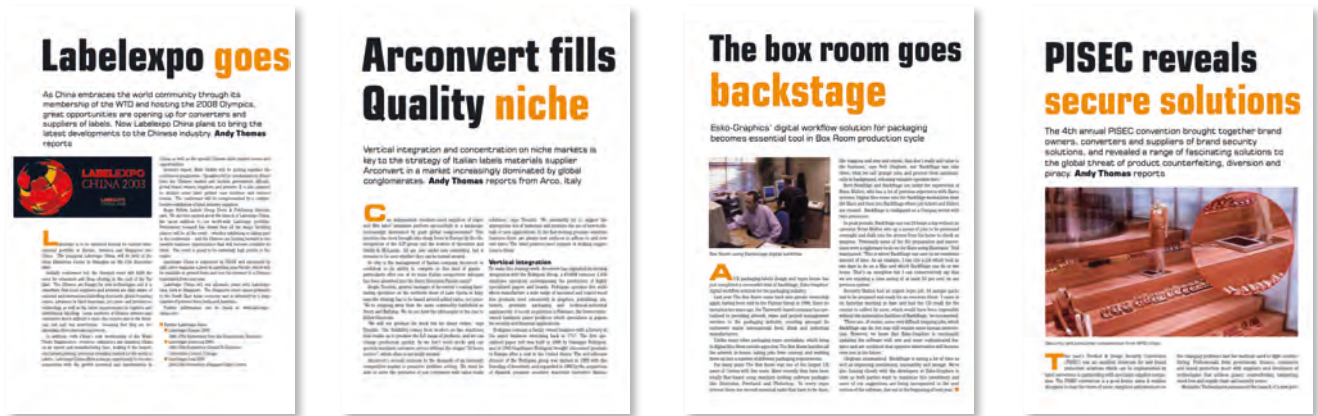
Cloud based roll reporting



Paper Converting Machine Company



L&L looks back (L&L issue 6, 2002)



P7 Andy Thomas-Emans reported on Labelexpo expanding beyond its portfolio in Europe, America and Singapore, with a new show in China. Initially conference led, the biennial Labelexpo China was expected to fulfil the need for education and ideas sharing in this part of the Far East. Nearly 20 years later, we have just closed a very successful Labelexpo South China 2020.

P33 Italian paper and laminates supplier Arconvert revealed that vertical integration and concentration on niche markets was key to its strategy in a market increasingly dominated by global conglomerates. The company exploited its integration with the Fedrigoni Group, a 1,950-employee operation encompassing the production of highly specialized papers and boards.

P43 L&L looked at an installation of Esko-Graphics' digital workflow technology BackStage at UK packaging repro house The Box Room. Unlike many repro specialists, The Box Room handled all the artwork in-house, taking jobs from concept and working them up into a number of different packaging requirements, running 24 hours a day without an operator in peak periods.

P58 The 4th annual Product and Image Security Convention PISEC brought together brand owners, converters and suppliers of brand security technologies, and revealed a range of fascinating solutions to the global threat of product counterfeiting, diversion and piracy. Andy Thomas-Emans took part and reported on emerging technologies, including RFID inlays.

Reasons for optimism

Editor's note

Rarely has a new year been so hotly anticipated. After such a challenging 2020, it is no wonder that the arrival of 2021 – with its promise of vaccines, mass testing, and a return (we hope) to some degree of normality – is so eagerly welcomed.

Our annual series of articles looking at developments in various global label markets during the past year is, understandably, dominated by the impact of the Covid-19 pandemic. It is the unavoidable thread that binds the pieces together, and as such some recurring themes emerge.

During the initial – largely global – lockdown beginning in March, economic activity plummeted. However, many label converters – serving industries such as healthcare and food – see their customers increase orders as consumers stockpile essential goods. The converters

“We are fortunate to be in an industry rightly deemed as essential. Converters are printing labels, and they are buying equipment”

adopt strict health and safety measures to protect employees, and respond with impressive alacrity and agility to highly challenging circumstances.

The knock-on effects of the damage to many of the world's economies are still unquantifiable. But we are fortunate to be in an industry rightly deemed as essential. Converters are printing labels, and they are buying equipment, as a brief glance at the installations section of labelsandlabeling.com will testify. Machinery manufacturers have adapted to remote installations and technical support. Some software developers and suppliers of consumables have

reported record sales.

There have been tremendous challenges, but, heading into the new year, there is cause for optimism. As Ronaldo Mello, head of Avery Dennison's label and graphic materials business in Latin America, notes in this issue, some major Covid-induced (or Covid-enhanced) trends – such as more cleaning, and the huge growth in e-commerce – are positive for the label industry.

In our Predictions for 2021 article in this issue, there are some words of caution from our contributors. But there is also a great deal of optimism for the direction in which the industry is headed – a greater focus on environmental sustainability;

increased automation; more efficient and less wasteful production. All these things can help to ensure a sustainable and profitable future for the sector.

Label converters and industry suppliers have both shown tremendous resourcefulness this year. We wish all our readers, advertisers and industry friends all the very best for the new year, and look forward to seeing you in person – at Labelexpo, if not before. And there's another reason to be positive.

James Quirk
Group managing editor

News



The 1,600sqm RSC will be the regional base for the company's Iberian operations

Flint Group opens regional service center in Spain

New Barcelona site will serve as regional base

Flint Group Packaging Inks has opened a Regional Service Centre (RSC) in Barcelona, Spain. The site strengthens the company's position in the Spanish market by enabling more localized technical and commercial services, as well as leveraging the benefits of the group's global manufacturing and warehousing capabilities.

The 1,600sqm RSC will be the regional base for the company's Iberian operations. Based in Les Franqueses del Vallès, a Barcelona municipality, the center will offer customers a quick turnaround for blending services and local manufacturing alongside warehousing and logistical services.

'We are continually investing in our business to help our customers around the globe reach new heights; therefore, we are delighted to offer an enhanced service level to our new and existing customers in Spain,' commented Eric Dussaut, commercial director at for Flint Group Packaging in western Europe. 'The investment reaffirms and strengthens our commitment to being the partner of choice to our Spanish packaging customers. Our customers in the region have been able to receive products from our European mother plants, but the opening of the RSC in Spain further solidifies our world-class product and service commitments to the area, helping us nurture even stronger relationships with our customers.'

'Along with this investment we are also pleased to announce increased warehouse capacity for our solvent-based range of products. We are proud to be investing in the local economy and generating jobs for people in the local area. Spain is an important market for Flint Group, and we are excited about the opportunities that lie ahead to grow the business and deliver the excellence in products and services that our customers have come to expect.'

Inovar Packaging acquires Tabco

Inovar Packaging Group has acquired Kansas City-based Tabco in partnership with the existing management team, further expanding its presence in the midwestern United States. Founded in 1957, Tabco serves the pet food, agrichemical, food and beverage, personal care and industrial sectors. Tabco is the fifth company acquired by Inovar as it seeks to build a regionally based label and flexible packaging business across North America.



Founded in 1981 by Dave and Elaine McDowell, McDowell Label is a true pioneer in the label industry

Resource Label Group acquires McDowell Label

Award-winning Texas converter joins Resource Label

Resource Label Group has acquired Dallas, Texas-based McDowell Packaging & Advertising Co (McDowell Label), enhancing its presence in the southwestern United States. Resource Label is a portfolio company of First Atlantic Capital, a New York-based private investment firm, and TPG Growth, the middle market and growth equity investment platform of TPG.

Founded in 1981 by Dave and Elaine McDowell, McDowell Label is a true pioneer in the label industry with a focus on customer service and award-winning production and design. The company has secured more than 500 national and international awards for its work in the packaging industry.

Mike Apperson, CEO and president of Resource Label Group, said: 'I feel privileged that the distinguished team at McDowell Label has joined the Resource Label family. McDowell Label is well-renowned for its award-winning products which help drive its customer growth. We are excited to join with the talented team at McDowell Label and look forward to growing together.'

'This is the right time to partner with an organization like Resource Label Group,' said Dave McDowell, chairman of McDowell Label. 'We are excited to be part of a company that recognizes the importance of quality, excellence and customer service. By joining Resource Label, we will be better able to serve our customers and offer an extended reach of products and capabilities.'

John McDowell, president of McDowell Label, added: 'The dynamic synergies shared between McDowell Label & Resource Label Group will fuel our award-winning credo and strengthen our commitment to provide innovative brand packaging solutions for those who demand excellence.'

Auxo Investment buys GC Dies

Private investment firm Auxo Investment Partners has acquired GC Dies, a steel rule die manufacturer based near Chicago. It is Auxo's fifth acquisition under the Auxo Die Holdings platform, a growing portfolio of die-cutting manufacturers the investment firm has acquired in recent years. The purchase of GC Dies follows acquisitions of Atlas Die, AtlasFlex, Bernal Rotary Dies, Midway Rotary Die Solutions, and DieCraft Engineering & Manufacturing.

News



Avery Dennison has increased investment in its Cramlington Concept Lab in northeast England

Avery Dennison strengthens UK support amid Brexit transition

Steps taken to ensure smooth transition

Avery Dennison has taken several steps to ensure that a steady supply of products and reliable local support to UK customers will continue through the Brexit transition and in the future.

Avery Dennison has increased investment in its Cramlington Concept Lab in northeast England. It has increased stocks of raw materials in the Cramlington distribution center to ensure customers can confidently order the supplies they need during the Brexit transition. The company has already established customs clearance arrangements at the facility.

'With over three thousand unique material combinations available with a low minimum order quantity for small batch deliveries, our customers are able to experiment with label applications,' said Darren O'Carroll, UK country manager at Avery Dennison. 'They can choose the optimal material for each individual application, instead of getting stuck trying to make a single bulk order work on every part of the supply chain.'

The firm's UK supply network, combined with its full-service research lab in Cramlington, allows customers to go from concept to project in 10 working days, with a minimum order of 1,000sqm.

'The print and packaging industry is really on the forefront of innovation,' said Mikaela Harding, technical sales support representative at Avery Dennison and board member of Finat's Young Professionals Network. 'I've gotten to work with really creative UK brands that are leveraging chemistry and engineering to turn their packaging into a differentiator, such as solutions that extend product freshness or support sustainable design.'

'These projects are highly collaborative, and it's been very encouraging to see how many partners across the supply chain are eager to team up to work on these larger solutions that are driving the industry forward.'

UK customers also have access to the R&D teams at the Cramlington Concept Lab for custom research and material recommendations.

EverGreene acquires Dixie Labels

EverGreene Tag & Label Group has acquired Tennessee-based Dixie Labels and Systems, to expand its manufacturing footprint with roll-to-roll digital print and finishing. Dixie Labels is a provider of pressure-sensitive labels and tags serving consumer product goods companies in the wine and spirits, health, beauty personal care, food and beverage as well as rug and flooring markets. 'Dixie Labels is an outstanding addition under the EverGreene Tag & Label Group umbrella,' said David Ehrhardt, CEO of EverGreene. 'It adds depth and breadth to our multi-plant operation.'

News in Brief

Western Shield acquires The Label Smith

Western Shield Label Company has acquired The Label Smith, a Texas-based flexo and digital label printer.

'Stephanie and Tim Smith have built an exceptional label company in the greater Houston area. We are thrilled to welcome them and The Label Smith team to the Western Shield family. The Label Smith acquisition affords Western Shield the opportunity to continue our growth plans in Texas and the Southwest,' said Nizar Elias, CEO of Western Shield.

'As our second location in Texas, The Label Smith greatly increases our presence in the region and allows us to offer expanded capabilities and capacity to existing clients and new customers. We are also very excited to build upon The Label Smith's already robust digital presence in the region,' added Dan Stadler, director of business development at Western Shield.

Maxcess expands global focus

The merged Maxcess and RotoMetrics have opened a new global headquarters in Chicagoland and appointed a vice president and general manager to oversee its European operations.

'Opening our global headquarters in the Chicagoland area better positions our leadership to manage our global operations and serve our international customers more directly,' said Odd Joergenrud, CEO of Maxcess.

With easy access to major international airports, the new global headquarters in Oak Brook, Illinois, will provide executives and key corporate functional teams from both Maxcess and RotoMetrics opportunities to better serve its domestic and international customers. The new location was also designed with safety in mind, with touchless doors, automated temperature checks and safety partitions to protect its associates and customers.

In addition, the organization has appointed Alexander Haid to lead its European operations as vice president and general manager. Haid was most recently a managing director at Caruso and has held a number of leadership positions at Bosch and Magna.

News

Xeikon appoints agent for Greece and Cyprus

Xeikon has appointed Athens-based Novacel Hellas to distribute the full range of its products for the label and packaging sectors in Greece and Cyprus.

Codimag appoints three new agents in Europe

Press manufacturer Codimag has appointed three new agents – Arets, Imagus and Lithomecanica – to promote Aniflo technology in Slovakia, Czech Republic, Greece, Cyprus and the Balkans region.

Edale appoints new agent for Spain and Portugal

UK press manufacturer Edale has appointed OMC, based in Spain, as its agent for the Iberian Peninsula.

Ravenwood appoints agent in Australia

Ravenwood has appointed Melbourne-based Result Group as its agent to promote linerless technology in this region.

Hamillroad expands in Asia Pacific

Hamillroad Software has appointed ColoRole, a flexo platemaker, to take its Bellissima DMS screening to market in China from its offices in Qingdao, Shanghai and Guangzhou.

Dantex appoints India distributor

Dantex's digital division has appointed Kolkata-based Printers Supply as a distributor. The agreement covers the Pico range of UV inkjet presses and related consumables for the Indian subcontinent territory.

Weldon to represent Matho in India

Weldon Celloplast and Matho have agreed to a sales and service cooperation for the Cuttopipe, Cuttobag and Cuttopress series of Matho for India.



Spilker has opened its new 3,500sqm facility in Lage

Spilker opens new production site in Germany

Site in Lage dedicated to flexible die production

After a year and a half of construction, German rotary tooling manufacturer Spilker has opened its new 3,500sqm (37,500sq ft) facility in Lage dedicated entirely to the production of flexible dies.

Spilker decided to further expand flexible die production at the end of 2018. However, as the expansion of the main site was not possible, the company invested in a new facility in Kachtenhausen, two kilometers away from its headquarters in Leopoldshöhe.

The site's proximity offers an important link between the three company divisions of flexible die production, rotary tool production and the construction of special machines for the converting industry.

The main Leopoldshöhe plant houses a technical center with converting machines for cutting tests under real production conditions. The construction and development departments will be also located in the main site to continue working on the development of bespoke projects. As the complete flexible die production is moving to the new location, the space will be used to further expand the production of rotary tools and mechanical engineering.

The new flexible die production plant meets the latest energy efficiency standards and features the wastewater treatment of the electroplating plant. The residual heat from the production processes is collected and reused for cooling and heating the premises.

'With the investment in the new site, Spilker is further improving its product quality in the flexible die sector and aligning its production lines with the latest technical and ecological requirements,' said Dietmar Rothhardt, head of the flexible die division at Spilker.

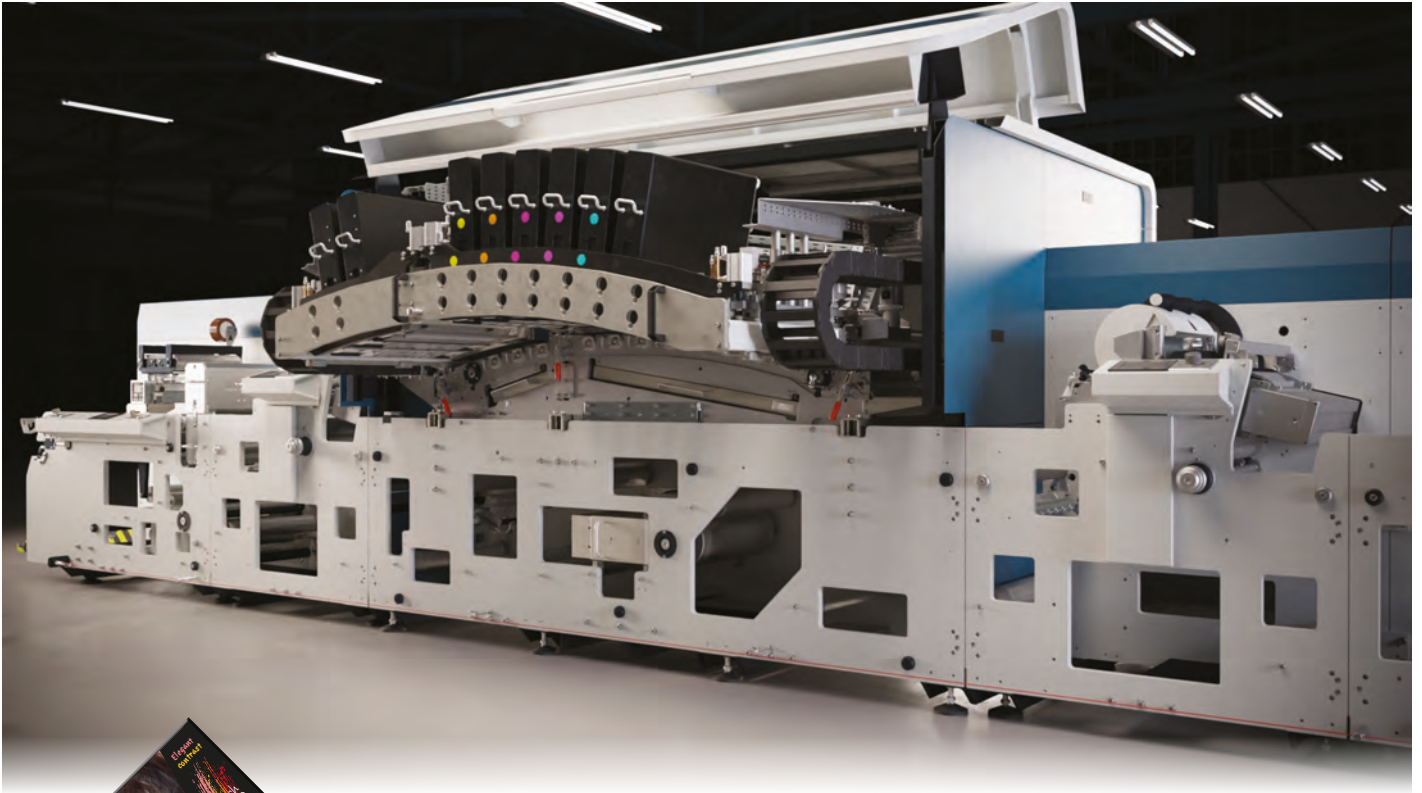
I.D. Images acquires Pointil Systems

I.D. Images has acquired Pointil Systems in Portland, Oregon, to expand its operational footprint and provide customers with a more diverse product offering.

Pointil Systems, founded by Wes Maughan, is a manufacturer of variable imaged information and identification products. It specializes in providing labels and tags for the food safety and traceability, agriculture, supply chain and warehousing, transportation, forest products, and medical industries. Pointil has also recently invested in flexible packaging capabilities.

'We are excited to combine I.D. Images' label expertise and footprint with Pointil Systems' capabilities and world-class commitment to serving its customers. This will provide our customers with a more diverse product offering and range of technologies,' said Brian D. Gale, president and CEO of I.D. Images.

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News



L-R: Giuseppe Conte, Prime Minister of Italy; Antonio Bartesaghi, CEO of Omet; Marco Sesana, country manager and CEO of Generali Italia

Omet awarded by Italian prime minister

Company recognized for employee welfare program

Italian prime minister Giuseppe Conte named Omet as one of the Welfare Champion companies of the Welfare Index PMI 2020.

The company has been identified as one of the 78 Welfare Champion companies out of over 6,500 entries. Additionally, this year the traditional welfare survey, the Welfare Index PMI, looked into the impact of the Covid-19 pandemic, highlighting the flexibility and resilience of these companies that represent the backbone of the Italian economic framework.

'This national award makes us proud,' said Antonio Bartesaghi, president of Omet. 'It's an appreciated acknowledgement for our welfare project, in which we strongly believe. This research shows that welfare improves business results: in Italy, companies have always based their competitive advantage on qualified skills and therefore they are used to giving value to people.'

'We will continue to invest in this issue to give our employees more value and to improve their time management: this means giving value to work.'

'Today we are celebrating stories of extraordinary entrepreneurs who focused their strategies on people, and this allowed them to be more competitive,' said prime minister Conte during the award ceremony.

Omet's welfare project offers time-saving services, agreements, training opportunities, free legal consultancy or fiscal support. During the lockdown, the company introduced a smart working approach that allowed the business to continue operating without interruption. Remote working will remain Omet's focus to increase efficiency and flexibility in the future. The new Molteno headquarters, where the company will move its business unit in 2021, will offer additional spaces to expand the services offered.

Meech expands UK premises

Meech International has expanded its production facilities to nearby Tungsten Park in Witney, Oxfordshire, UK. The additional 22,000 sq ft Unit 2 at Tungsten Park will house Meech's production, while its headquarters will retain its commercial and administrative offices, as well as engineering and expanded R&D department.

News



ePac Flexible Packaging has expanded into Africa with a production plant in Ghana

ePac opens first plant in Africa

New plant in Ghana expands international footprint

ePac Flexible Packaging has expanded into Africa with its first production plant in Ghana. It is already taking orders, which will be fulfilled by ePac's UK-based factory while building a plant in Africa is underway.

ePac Ghana will be a collaborative venture with ePac Holdings managed by Victor Sosah, a Ghanaian entrepreneur with extensive experience in flexible packaging.

'We are fortunate to have a partner in Ghana with all the qualifications we look for when opening a new ePac location. Victor brings a multitude of talents to ePac, cares deeply about the community, and is committed to helping local brands grow. This is precisely ePac's mission across the globe,' commented Jack Knott, ePac's CEO.

Victor Sosah added: 'As a Ghanaian, I am acutely aware of the need for healthy eating options in our country, increasing local production, and reducing our reliance on imported foods whilst promoting made in Ghana products locally and internationally. Our focus here with ePac Ghana will be to help local and regional small and medium-sized businesses be successful and to make a difference in the communities we serve.'

L&L founder Mike Fairley publishes first novel

Mike Fairley, the founder of Labels & Labeling and the Label Academy, has turned his hand to writing his first historical novel, based on the life of Herleva de Falaise. She was born in Normandy, France, in 1012 and became the mistress of Duke Robert I at the age of just 16 and mother of an illegitimate son and daughter by him. Her son, William, was subsequently crowned Conqueror and King of England, in turn bringing almost 300 years of Norman rule and the French language to the country. The story that unfolds is an interesting insight into the life and times of a relatively unknown tanner and fur trader's daughter from Falaise in France, whose impact on the long-term history and evolution of England and France has previously been little known and largely undocumented.

The book can be obtained through Amazon as a paperback or for reading on a Kindle.



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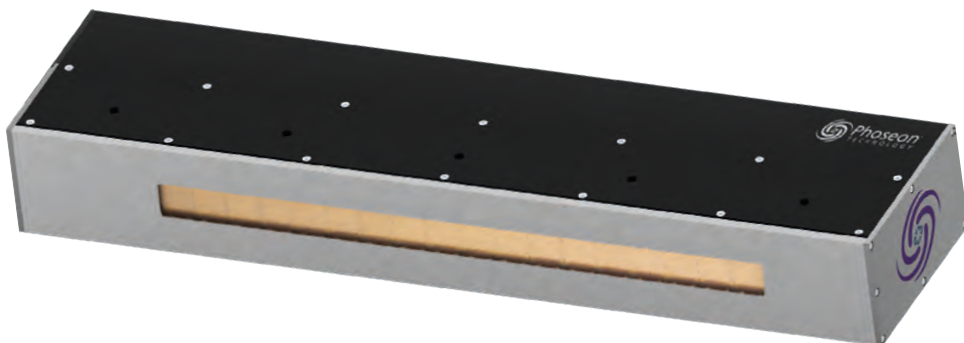
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New Products

01



02



03



04



01 PX30000
Xeikon

The new PX30000 is a UV inkjet label press driven by Xeikon's X-800 digital front end, equipped with eight printing stations, two of which are used to achieve high opaque white layers at maximum speed. It is marketed as a cost-effective and fast time-to-market alternative for short and medium run flexo jobs, enabling production of a wide range of labels, including the glossy tactile look, featuring optimum durability and high levels of resistance against scuffing and scratching. The PX30000 offers a wide range of capabilities and features, including an Overall Equipment Effectiveness (OEE) that can be optimized using the available Xeikon Premium Services. It operates at a maximum speed of 70m/min (229ft/min), uses opaque white, and can accommodate substrates up to 340mm (13.4in) wide.

02 Digifast 20000
Prati

Prati developed Digifast 20000 for HP Indigo digital presses, offering new in-line and off-line converting capabilities. Designed for integration with HP Indigo 20000 or 90000 digital presses, it is configurable to meet individual finishing requirements from varnishing, to full or selective printing, embellishing and finishing a job either in roll or in sheet for further processing. Digifast 20000 has a functional modular architecture optimized for the finishing of the printed packaging sector, integrating different technologies for pressure-sensitive labels, in-mold labels, shrink sleeves and wraparound labels.

03 any-Jet II
anytron (Bitek Technology)
The South Korean manufacturer's any-Jet II is a digital press with in-line finishing options developed for the label and flexible packaging markets, powered

by Memjet inkjet printing technology. It offers 1,600 x 1,600 DPI resolution with lamination and custom label shapes and sizes with laser die-cutting. It supports variable printing and cutting speed between 3 and 18m/min (9.8 and 59 ft/min) depending on the label design. It offers over-laminating, laser die-cutting, matrix removal and slitting. It can be additionally used for flexible packaging printing and laser scribing for easy opening pouches. A new feature is any-Flow, an integrated workflow and RIP software allowing control of the printer and laser die-cutter with an integrated user interface.

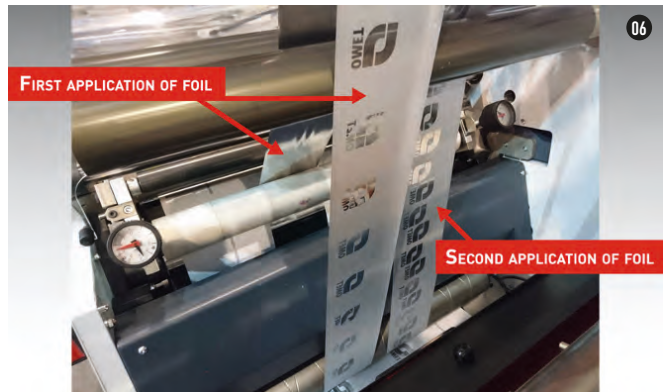
04 DM-liner metallization unit
Leonhard Kurz
Leonhard Kurz has expanded its DM-Liner series of machines for digital metallization with the standalone DM-Uniliner finishing unit developed for the narrow web sector. Label printers can use the DM-Uniliner before or after color printing. If the metallization

is applied before, the colors are applied by overprinting take on a brilliant metallic gloss. When designs with a rainbow color play or holographic structures are used, the overprinting creates shimmering and vibrant light and color effects. Thanks to the high-pressure stability of the printing unit and constant web speed, the machine is able to process substrates with the speeds up to 75m/min (246ft/min) and is suitable for rolls of up to 800mm (31.5in) in diameter.

Cotone Nero Felt
Arconvert Ritrama
Arconvert Ritrama has launched Cotone Nero Felt, a new self-adhesive paper in its Manter range made entirely from cotton fibers with a deep black color added directly to the paper pulp for a luxury finish. Cotone Nero Felt has been developed for premium brands looking for labels which would add a textured look and feel to their high-added value products such as wines, spirits,

New Products

05



07



08



champagne, gourmet food, craft beer and cosmetics.

05 Flexo unit for AccurioLabel Konica Minolta

A new optional flexo printing unit enables in-line production of white and other colors and can be retrofitted to AccurioLabel 190 and 230 digital presses. It has been developed with Danish company Grafisk Maskinfabrik, Konica Minolta's manufacturing partner in Europe, for label converters who are looking for hybrid technology to complement digital printing systems. It uses standard flexo inks and, in combination with an overprint sensor kit, provides perfectly registered in-line overprinting of white or any other color, which allows a wider range of applications such as printing on clear substrates. The flexo printing unit comprises an unwinder, web guide, a flexo printing station, UV curing system, an output NIP and a touch control panel.

06 Cold Foil Saver Omet

Omet Cold Foil Saver is available for all Omet flexo presses, starting from the iFlex up to the X6 series, as an attachment which can be retrofitted. This new technology allows printers to use the same foil twice for the same print, with no compromise on the printing speed and delivering the same quality as cold foil transfer. According to Omet, the Cold Foil Saver can deliver up to 50 percent raw material savings thanks to a special paper path specifically designed to perform a double pass of the cold foil in perfect register.

07 Excimer UV mattifying system GEW

The UV lamp system uses dielectric barrier discharge (DBD) lamps to produce quasi-monochromatic vacuum ultraviolet radiation, typically at 172nm. This radiation is commonly used for mattification of surface coatings where the

elimination of matting agents can significantly improve stain resistance and durability of the final product. Gloss levels down to 2 GU can easily be achieved and the high efficiency lamps only require 5W/cm input power. Instant on/off switching enables customers to switch between high gloss (80 GU or higher) and matt finish products in seconds. Other applications include modification of surface tension for improved adhesion, or surface cleaning for semiconductor and medical industries.

08 365nm curing lamp Phoseon

The new premium 365nm 12W/cm² UV LED lamps are designed primarily for the adhesive, inkjet and screen-printing markets where high power, in a compact form factor, is a key requirement. The FireJet One lamps, in widths from 75 to 375mm, are now available at 365, 385, 395 and 405nm. The lamps scale simply by placing units next to one

another, daisy-chaining them together. Phoseon's unique optics ensure consistent uniformity at the substrate surface. The FireJet product line is simple to integrate by being a fully self-contained unit. The lamps can be controlled using PLC signals to provide instant on-off, intensity control and other primary functions.

Mactac

Lintec Low-Ooze labelstock

The new labelstocks feature a selection of durable films paired with Lintec's PAT1 and automotive-approved P0066 aggressive acrylic adhesives. The new product line is intended for use in labeling durable goods, electronics, appliances, warning and instruction labeling, and automotive and medical labeling applications.



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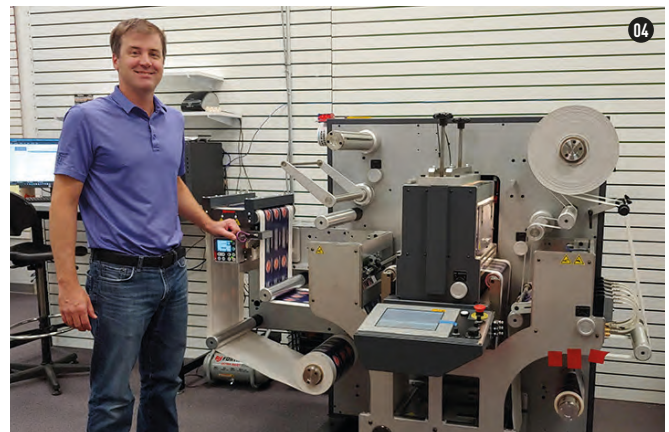


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Configure the label printing press for your business model. Thanks to the exchangeability of the printing process the Gallus Labelmaster offers a new dimension of flexibility at an excellent price-performance ratio.

Installations



**01 Actega Metal Print EcoLeaf
Germark, Spain**

Germark has installed an EcoLeaf metallization unit from Actega Metal Print at its Barcelona facility to produce sustainable metalized decorative effect labels. Despite the pandemic, the EcoLeaf unit was safely installed on an existing Omet 410mm (16in) flexo press and is expected to bolster the company's service offering with new silver metalized labels for the cosmetics market, as well as overprint capabilities that leverage an extensive range of metallic colors, including gold. 'March and April saw us enjoy record months supporting supermarkets to meet demand, but the pandemic has since put a huge pressure on the local Spanish economy and our internal sales. However, thanks to its unique and cutting-edge capabilities, EcoLeaf will be a key tool in enabling us to meet this challenge and increase our export business in new and previously out-of-reach markets,' said Iban Cid, president of Germark.

**02 Grafotronic SCF
Abbott Label, USA**

Abbott Label, a US-based trade-only converter, has invested in Grafotronic's SCF Super Compact to expand its digital finishing capabilities. Abbott Label operates facilities in Atlanta, Illinois, California and Texas. In 2015 it invested in digital technology and four years later expanded its digital capabilities in Dallas with a UV inkjet press. 'We needed a machine that not only has a compact size and will perfectly fit in our manufacturing facility, but also is able to finish digitally printed labels and keep up the pace with the inkjet machine,' said John Abbott, president. 'The Grafotronic can run a full varnish or spot varnish and has a lamination station, which allows us to not only do long run productions, but even extremely small print runs with variable content. A big advantage of the SCF is the semi-rotary die-cutting station that operates at 220ft/min (70m/min).'

**03 Gallus Labelmaster
Nordvalls, Sweden**

The Swedish converter has installed two more Gallus Labelmaster presses to meet increasing demand. The two new flexo presses will join the first Gallus Labelmaster installed a year and a half ago, and will be installed in December 2020 and January 2021. 'We invest because we continue to grow and need to expand our capacity, but also to increase our flexibility and continue to meet customers' requirements for short delivery times,' said Patrik Jenemark, Nordvalls' managing director. The two new presses are equipped with flexo and screen units. Moreover, a cold foil unit and a rotary die-cutting unit will be integrated.

**04 GM DC330Nano
Rival Branding, USA**

Based in Lenexa, Kansas, Rival Branding is a digital-only printing company, established in 2016 to support start-up brands with

high-quality labels at low cost and low minimum orders. The compact DC330Nano from GM provides lamination, die-cutting and slitting. It is ideal for converting labels printed on lower volume digital presses or as a back-up to an existing finishing line. It can be configured to run either in-line or off-line. During the pandemic, Rival Branding has been producing clean seal stickers for use in hotels, properties and resorts, so faster time to market was the company's priority.

**Focus Reflex 330
Vista Labels, UK**

Vista Labels has invested in a Reflex 330 flexo press from Focus Label Machinery to increase capacity and improve print quality on PE materials. The newly installed press is a 13in wide, single color machine equipped with quick change print cassette system, die-cutting, slitting, rewinding and infra-red drying.

Installations



05 Xeikon 3500
Labo Print, Poland
 The Polish label converter has invested in a Xeikon 3500 digital press to diversify its capabilities by adding paper cup production to its portfolio. 'Thanks to the versatility of our Xeikon 3500 digital press, we have created a new department in Labo Print dedicated to the manufacture of paper cups,' commented Krzysztof Fryc, CEO and co-founder of Labo Print. 'At present, we are implementing Xeikon dry toner technology for the printing of paper cups utilizing our client's choice of any graphic design. We can also provide quantities as small as several hundred units which is undoubtedly an advantage to our customers.'

04 MPS EFA+ 530
Rottaprint, Romania
 Rottaprint has ordered the first MPS press in Romania, an EFA+ 530 fully automated multi-substrate flexo machine with 'Talk to me' connectivity.

The EFA+ is a multi-substrate press for printing labels and flexible packaging on any material, including thin unsupported films, self-adhesive labels, shrink sleeves and carton board up to 450µm. The EFA+ package enables servo-driven automation of all print pressure settings.

GMG Color package
Aztec Label, UK
 The specialist label company has introduced GMG ColorProof and GMG ProofControl software to the business to proof demanding color and material combinations and provide verification that proofs are accurate for CMYK and spot elements. In addition, GMG OpenColor, allows custom proofing profiles to be created with the utmost accuracy.

07 Dantex PicoColour
ModTek, USA
 Traditionally a flexo print house, ModTek has used digital print for a number of years, having upgraded an existing flexo press

with a digital print module. The PicoColour offers a printing width of 8.25in and a running capacity of 82ft/min. It works with UV-based inks and is available with CMYK + white, with a wide range of optional features such as variable data, lamination, die-station, edge trim and splicing, all of which were added to ModTek's PicoColour.

08 Durst Tau RSCi
Accu-Label, USA
 Accu-Label has invested in a 20in version of Durst's Tau RSCi inkjet press. Accu-Label was co-founded 33 years ago in Fort Wayne, Indiana, by David Manning Jr, who started the company in his garage. From the beginning, he focused on producing high quality labels and providing personalized customer service. 'Creating custom labels at Accu-Label is more than just a job for us. It's a calling. For over 30 years, we've been answering that call by investing into the foundation of our business,' said Manning. 'We chose Durst

because they really understood our business needs. Yes, speed was a big consideration, but we needed more. We felt the Durst RSCi gave us both speed and exceptional quality compared to other digital printing technologies currently available on the market. We see the RSCi as the best complement to our flexo process.'

Kodak Flexcel NX Ultra
Dion Label, USA
 Dion Label has installed a Kodak Flexcel NX Ultra. 'The quality achieved with the Kodak Flexcel NX plates had been on our radar for some time, however, we were looking for a non-solvent technology. As soon as the aqueous Flexcel NX Ultra became available, we quickly made the switch from our thermal system,' said Brent Berthiaume, Dion Label pre-press manager.



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



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Appointments



Dr Nicolas Wiedmann
CEO
Siegwerk
 Wiedmann will replace Herbert Forker, who will retire in March 2021. He will join Siegwerk on January 1, 2021, and will take over full responsibility following the transition period.



Kerry Langley
Vice president sales
Sato America
 Langley reports to Steve Sundstrom, senior vice president of Sato America, at its headquarters in Charlotte, North Carolina. She was previously Oceania region head for Sato and managing director of Sato New Zealand.



Martin Boucher
Director of sales
Fujifilm Canada
 Boucher will be responsible for driving the sales growth of graphics products throughout Canada.



Virginia DaCosta
Sales manager
RM Machinery
 Based in Montreal, DaCosta will drive sales of RMM's core products: Mitsubishi and RMGT offset presses, Miyakoshi inkjet label and book presses and GEW UV LED curing systems.



Erik Langaker
Independent chair
PragmatIC
 Langaker will complement the company's existing board of directors. This appointment comes alongside additional funding of over 13m GBP (17m USD). Langaker will also invest his own funds in the company's current funding round.



Juan Cano
Director of business development
Screen Europe
 Cano is director of business development for flexible packaging. He will lead and expand the company's new digital flexible packaging division.



Jim McClatchy
Director, global strategic accounts
MacDermid Graphics Solutions
 McClatchy is responsible for the management and revenue growth for select multi-national clients.



Dr Martin Čadek
Vice president
Flint Group
Flexographic Products
 Čadek is vice president of operations and supply chain management, based in Willstätt, Germany, where the company produces flexo and letterpress printing plates. Čadek succeeds Dr Thomas Zvez who leaves the company after 31 years of service.

Coen de Graaf
EMEA sales manager,
Imagingcomm division
DNP
 Coen de Graaf has been appointed as sales manager EMEA of DNP's Imagingcomm division in Europe. de Graaf will lead DNP's European sales team, responsible for the growth of thermal transfer ribbons and card business in the EMEA region. Also promoted is Jan-Paul Back, who is now marketing manager EMEA for DNP's Imagingcomm division in Europe.

Luca Zerbini
Managing director
Fedrigoni
 Zerbini is the new managing director of the company's paper and security division.



Neil Little
UK sales manager for AVT
Esko
 Esko has appointed Neil Little as UK sales manager for its newly integrated AVT quality inspection systems business. Little brings a wealth of experience in the business, having worked at both pre-press and converter companies in the past.



Dario Zucconi
Branch manager
UEI Group
 Based in northern California, Zucconi will service customers located the northwest United States.



Massimiliano Merlo
Chief commercial officer
Glunz & Jensen
 Merlo is responsible for global marketing and sales within the group. He is based in Nice, France.

Richard Kelsey
Chief financial officer
Constantia Flexibles
 Kelsey is interim CFO replacing Tanja Dreilich, current managing director and CFO, who is leaving at the end of 2020. The CFO tasks have been taken over by Kelsey, SVP of consumer finance, on an interim basis as of the beginning of October to ensure a smooth transition.



Dave Miller
Vice president operations
Anderson & Vreeland
 Miller has been promoted, thus expanding his responsibilities with operational initiatives such as procurement, distribution, logistics, facilities management and information services.



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

Label & packaging showcase

01



02



03



TLMI Annual Awards

North American converters submitted more than 200 entries in 43 categories for TLMI's Annual Awards. Best in Show went to MCC's 'Sixth Sense' prime label. It won Best in Class and First Place honors in the Flexography or Letterpress, Wine & Spirits, Color Process Prime Category making it eligible for Best in Show.

Best in Show:
 01 *Multi-Color Corporation*
 North America
 Sixth Sense

Best in Class:
Digital – Toner:
 02 *Syracuse Label & Surround Printing*
 Bullish Brut

Digital – Toner, Wine & Spirits:
 03 *Multi-Color Corporation*
 Australia
 Where Eagles Dare

Color Process, Prime, Excludes Wine & Spirits:
 04 *Brook & Whittle*
 Blueberry Sugar

04



05



06



07



08



Flexography, Excludes Wine & Spirits:

05 Outlook Group
Stray Forth Blackberry Cucumber
Enchant-Mint Hard Seltzer

Offset, Excludes Wine & Spirits:

06 Multi-Color Corporation
North America
Budweiser Wood Label

Roll to Roll – Includes Shrink Sleeves:

07 McDowell Label
& Screen Printing
Rumpy

In-Store Promotion:

08 Digital Label Solutions
Kia Buy 3



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The Mike Fairley column

The smart label factory of tomorrow

Connectivity and data flow can revolutionize the whole supply chain

The organization, administration, production, performance and efficiency of a label plant has improved dramatically over the past 40 years as advances in computerization, hardware, software and electronics have brought significant performance, product and management efficiency opportunities of anything up to 30 percent to many in the label industry.

Certainly, the process of combing the varied technologies, through the integration of label press and ancillary machinery with the latest pre-press and workflow systems, has already been proven to create major benefits.

This was recently demonstrated by MPS, Esko and Cerm at a two-day Performance Connected Event in which it was shown how MIS connects with Esko pre-press and directly with the MPS press operating system, and the performance improvements it can offer a daily operation. Esko also showed how Value Stream Mapping (VSM) can benefit the label business. VSM focuses on a company's value creation workflow, exposing waste and inefficiencies based on insights gathered from employees, revealing opportunities to improve productivity and throughput.

As a label production facility become more highly digitized and systems are connected with each other – exchanging data about production in real time – communication flows smoothly and seamlessly between the various systems and the whole production process starts to happen without any human intervention.

The industry has also already experienced the introduction of predictive maintenance technology. Such systems give early warnings when a machine or network's performance is going down, so action can be taken to fix the problem without lost downtime or losses accruing to the business.

Learn and adapt

One of the key aspects to this exchange of information taking place is data flow. It means the label plant is able to learn and adapt to the changing needs of the business. It becomes an intelligent production system that learns on a day-to-day basis and then adapts dynamically to the changes that it has learnt.

It also offers the opportunity for employees and supervisors to move around the factory floor and access data they may require from any system, thereby enhancing their role and increasing production.

So where does the industry go from here? Apart from machine-to-machine connectivity, data flow can extend the connectivity within the shop floor to the whole supply chain, combining physical machinery with the whole business process – and making complex decisions related to business efficiency and business optimization with little, if any, human interference.

Many label industry suppliers have developed their own systems, making it possible to place, or change, orders for substrates, inks, sundry supplies or components all online. Some converters have links with customers to place repeat orders, initiate new orders, or check on job progress. Some MIS systems also have the possibility of linking with distribution/shipping companies to arrange job

delivery and then informing the customer of the delivery time and date.

This potentially extends the label plant's visibility way beyond its four walls. It creates a completely dynamic workflow that increases productivity and provides for a smooth label operation from beginning to end. With end users looking to rationalize suppliers, it will be those efficient and smooth operations that are likely to benefit.

What comes next is building all the systems and procedures into the next generation of 'smart factories'. Factories that combine management workflow control systems, data systems, and physical systems so as to reduce any time lags in the production process, thereby leading to improved efficiency and improved use of factory resources. Resources which all work together in order to gain significant factory efficiency benefits, as well as meeting supply chain and customer needs in real time.

"Data flow can extend the connectivity within the shop floor to the whole supply chain"

This kind of evolution is likely to be incorporated with systems for energy efficiency, including management of energy used in the factory, and recording and processing heating and lighting information, compressed air efficiency, electric motor performance.

What if all employees buy electric powered cars, bicycles or scooters over the next few years and require charging points at their place of work? Indeed there have been studies that indicate savings of 15-20 percent in energy consumption are possible if integrated energy management is introduced.

And how is this electricity consumption going to be administered? Will the converter collect the data and charge the employee, or will they have payment facilities on the charging points, or even incorporate it as a non-chargeable employee benefit? Decisions need to be made soon.

There are also other areas of factory energy and resource usage that are likely to need managing in the future. Heat exchange pumps for heating water, solar panels on the roof for electricity generation, wind turbines, the collection and use of rainwater for toilet flushing. The list could go on.

What seems clear is that smart factories are well on their way, and will continue to grow and integrate their systems and operations. Those label plants that best see the potential and opportunity to becoming even smarter will surely be those that benefit the most in tomorrow's world – and probably be the most profitable.



For more Mike Fairley columns, go to www.labelsandlabeling.com/contributors/michael-fairley

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The Andy Thomas-Emans column

Innovation powers growth

Innovation and entrepreneurship have driven consistent growth in the label industry

I spoke recently with a major finance group looking to invest in the label industry. One of their main questions was how it was possible for the label industry to have kept growing globally while growth and profitability in the wider commercial print industry faltered.

My answer was two words: innovation and entrepreneurship.

Looking at the fascinating 'L&L looks back' column in each edition of this magazine reminds us that innovation goes right back to the start of the narrow web industry, constantly creating new opportunities for label converters to add value and upsell their services.

“Innovation goes right back to the start of the narrow web industry, constantly creating new opportunities for label converters to add value and upsell their services”

Innovation has revolved around the modular nature of the narrow web press line, which has also stimulated development of new materials, inks, plates and so on. In the 1970s and 1980s letterpress was the dominant print technology in Europe at a time when it had been overtaken by offset in the commercial print industry (apart from some small niches in book printing). Letterpress cured with UV allowed narrow web converters to offer their brand owner customers extremely high-quality print.

At the same time, narrow web press manufacturers developed modules which allowed further decoration processes to be added in the same press line, including screen printing for heavy laydown opaque whites and 3D effect varnishes, and hot foil/embossing. Flexography was a fast-developing process at this time, and narrow web manufacturers took the opportunity to add flexo coating units for varnishes and coatings.

It was developments in flexography which were to provide European label converters with their next opportunity. While in the US water-based flexography was the dominant technology throughout the 1980s, the early 1990s saw the development of UV-cured flexography. The greater simplicity of the flexographic process soon made UV flexo the upcoming technology of choice for label converters, particularly with the development of digital platemaking. Once again the same level of integration of add-on modules allowed them to offer hot foil/embossing and UV screen in the same press pass.

At the same time cold foil was developed as yet another drop-in modular process unit. Cold foil allowed foiling effects to be added

to heat-sensitive materials such as direct thermal labels. Its low origination and operation costs compared to hot foil allowed foiling effects to be added to a huge range of labels for which hot foil was too expensive, particularly in the food and drinks sectors.

Two other key commercial print processes, offset and gravure, were also adapted for narrow web converters, opening up different paths to added value. UV offset formed the basis of narrow web presses targeted at the high-quality toiletries and cosmetics sector – again combined with processes such as screen, flexo coating and hot foil/embossing. Gravure made an appearance as another optional add-on module, specialized in adding first-down white, metallics and cold seal coatings.

Added value

Over the last decade we have seen digital printing opening up a new range of value-added opportunities, not only as a standalone process, but also as another module which can be offered on an in-line narrow web press.

If we look at the different ways digital has been integrated into conventional print platforms, we see the same kinds of innovation taking place. So, for example, we have seen a digital print bar (a mono inkjet unit the width of the press) jetting a first-down white as a replacement for a UV screen or UV flexo unit, which in turn is made possible by the development of more opaque inkjet whites – a real achievement given the viscosity limitations of inkjet. Printbars can also be used to add a variable black (effectively a digital black plate) or a spot color.

We have also seen multi-color digital print units added to flexographic presses. On these hybrid presses, digital has replaced flexography as the main print engine while making use of traditional in-line converting, finishing and coating units.

Today's big development is digital embellishment, where digital imaging is being applied to spot matte/gloss varnishing, foiling, screen-type 3D and tactile effects and simulated embossing/debossing. These technologies are available in different combinations of off-line and in-line, and once again will open up new opportunities for label converters to add value to the services they offer.

Which brings me back to my conversation with the finance group. As I explained: the label industry has grown consistently – at least two percentage points above GDP everywhere in the world – because technology companies are constantly developing innovations which allow the print industry's most dynamic and entrepreneurial business owners to offer new and added value services to their customers. It really is as simple as that.



For more from Andy Thomas-Emans, go to www.labelsandlabeling.com/contributors/andy-thomas

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Maximize your value during Covid-19

Bob Cronin of The Open Approach highlights four ways to ensure the best opportunities for your company

The pandemic has had a sweeping impact on the global market. Not only is it dictating which products and services are (now) in demand, but also which companies can survive, thrive, or profitably sell or divest assets.

Prior to 2020, a company's M&A valuation was most often determined by a factor of its EBITDA (earnings before interest, taxes, depreciation and amortization). Now, businesses are being valued by their 'EBITDAC' (earnings before interest, taxes, depreciation and amortization... and impact from Covid-19). The world has changed, and the considerations of acquirers and private equity investors have undergone a major shift.

“Stop hoping for a return to normal and develop a plan to take advantage of the change”

While some label and packaging enterprises are struggling from pandemic-related issues, others have reshaped their organizations to compete (or be acquired) in the new normal. To ensure the best opportunities, here are the top four areas that need your focus.

1. Cash is, and always will be, king. Our industry has been operating under the Covid bubble for many months now. Demand has changed, clients have strayed or shuttered, and many once-steady orders have shifted into some other element entirely. The healthiest companies are always those that have cash on hand to manage current needs and invest in growth opportunities. In this market, this has become an imperative. Protect your balance sheet, avoid unnecessary expenses, and negotiate to extend/expand any current lines of credit or financial leverage you have available. The effects of the pandemic may last for years. The companies that can survive this storm will be far stronger than after any other market shift in recent decades.

2. A Current and future-directed business model. The pandemic has overhauled how and what customers are buying. If you've suffered a hit in order flow, you need to examine your capabilities and product lines. Many segments have been hit, while others (including the new safety labeling category) are building momentum. Bring digital assets in-house or augment those that

exist. Every label company needs to be prepared for the new market, which means having the ability to respond to continued changes, ongoing mandate updates, and arising cautions. The change in US presidential leadership will also have an effect on what will be demanded from both buyers and end users. Invest your growth and marketing dollars into harnessing the new trajectory and ensuring you're aligned with it.

3. The right markets, and strength within them. If you haven't scrutinized your markets in the last 30 to 60 days, do so now. Every industry has been affected by Covid-19 – all in different ways. What are the current dynamics, restrictions and end-user expectations? How have your customers' volumes changed? (Retail, healthcare, hospitality, private label brands and other large label buyers are shifting purchases, and many are spending significant funds on packaging items that never existed before.)

Moreover, look at how your specific top customers are responding. What are they buying? What might they need? When the pandemic hit in early 2020, most companies had no idea how to respond. They robotically bought the various warning labels, floor graphics, six-foot stickers, safety glass (and static clings/labels) as advised by the WHO and the CDC. Many are still looking for guidance.

The most profitable label companies are those that are the most innovative. Talk with your customers about what will help them grow. Discuss plans to update their worn Covid-related signage/labeling on a regular basis. Changes in Covid approaches – and customer complaints and litigation – are necessitating new messaging/labeling. Stay close to your customers and progressive in capturing these upcoming opportunities.

4. Financial savvy. Just as important as answering customers' product needs is staying in tuned to their stability. Their financial health will impact yours. Maintaining balance is key. If one of your markets, for example, is forecasting a 30 percent revenue pinch, customers in it may put you under more pricing pressure to help them survive. Make sure you have others that can offset this. Look at supermarkets (up an average 20 percent), hand-sanitizing/cleaning providers, food and beverage labeling, and other growing areas, and see what you can do to carve out a niche.

Additionally, buckle down on your financials. Determine what's most profitable now, and how to continually land this work. Pursue faster receivables through incentives or prepayments (such as through online stores/web-to-print portals). Work on reducing your expenditure, including consumables, office space, equipment and utilities. Focus on your cash flow and ability to pay suppliers on a timely basis. Rigorous financial efforts are more important than ever.

Whether or not you're considering an M&A deal, you'll need to reassess where you're going – and growing. Covid's impact is here to stay. Stop hoping for a return to normal and develop a plan to take advantage of the change. How you respond will determine your challenges and which resources you can leverage to maximize your opportunities.



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 (001) 630 323 9700



Q&A

CELAB is an ad-hoc coalition empowered to reach across the entire supply chain and leverage the expertise of industry participants to drive progress on matrix and release liner recycling. Piotr Wnuk asks CELAB representatives about their goals and progress to date

From top, L-R: Anzelma Harjo, Avery Dennison; Francesc Egea, IPE Industria Grafica; Juha Virnavirta, UPM Raflataac; Fernando Giron, Arconvert Ritrama; Ralf Drache, Herma

L&L: What is CELAB and who can be a part of it?

Anzelma Hajro, marketing programs and compliance manager at Avery Dennison Label and Packaging Materials, CELAB-Europe Steering Group chairperson: CELAB stands for Circular Economy for Labels. The full name including tagline is CELAB, Towards a Circular Economy for Labels. This is the first global consortium dedicated to recycling in the self-adhesive labeling industry. Under the global CELAB umbrella, regional consortia are currently being set up. CELAB-Europe now has 20 members, mostly release liner and chemical producers as well as self-adhesive label materials producers.

Francesc Egea, director at IPE Industria Gráfica and former Finat vice president, representing Finat on the CELAB-Europe Steering Group: Finat has been representing the interest of label converters in the initial stage and is currently also hosting the European consortium. Our goal is to have label converters, label users and other parties from the value chain like recyclers and logistic providers join this collaborative initiative as well.



Release liner sample

L&L: What are CELAB's priorities?

Ralf Drache, director of sales and marketing at Herma, CELAB-Europe Steering Group member: CELAB's vision is to create a sustainable self-adhesive labeling industry by offering solutions and providing education to enable matrix and release liner recycling. CELAB's mission is that the self-adhesive labeling industry has access to matrix and release liner recycling. Comprising many of the self-adhesive label industry's largest companies, CELAB will operate as a technology and solution neutral coalition, empowered to reach across the entire value chain to promote a circular economy for self-adhesive label materials.

CELAB is designed to facilitate collaboration at a global level and encourage the universal adoption of best practices while fostering regionally appropriate initiatives and cooperation. Brands are eager to communicate their commitment to sustainability in response to consumer demands. With increased recycling capability gradually emerging from suppliers, producers, waste management, chemical recyclers and others, we see a tremendous opportunity to facilitate collaboration with partners up and down our industry's value chain.

L&L: What is the role of the global and regional branches?

Anzelma Hajro: The Global Steering Committee sets priorities for the consortium, coordinates the communication and information flow between the regional branches to share and spread best practices,

“Our goal is to have label converters, label users and other parties from the value chain like recyclers and logistic providers join this collaborative initiative”

and facilitates market and technical research that supersedes the regional level. For instance, CELAB recently commissioned AWA to conduct a global market research study. The study reports on the current state of volumes, recycling rates and recycling capabilities that can be adopted around the world, and includes a quantitative assessment of the worldwide market, by key geographic regions for paper liner and PET release liner, that provides insights into the current end-of-life reality.

Furthermore, under the leadership of Alex Knott (Dow Chemical Company), CELAB is currently conducting a technical review of release liner recycling to understand existing recycling technology by gathering information on current processes. Here, CELAB is preparing a series of white papers that will include input from raw materials producers (paper and silicone), recycled paper producers, recycling companies (collection) and industry organizations to understand the impact of release liner not only on the final recycled paper product but also on the paper making process. The objectives of these white papers are to provide basic technical information on liner recycling on a global basis, without sharing

CELAB members

CELAB Global members:

Ahlstrom-Munksjö, Avery Dennison, BASF, Dow Performance Silicones, Elkem Silicones, Henkel, Loparex, Mactac, Mondi Group, Multi-Color Corporation, PolyPlex, UPM Raflatac, Sappi Europe, Siliconature

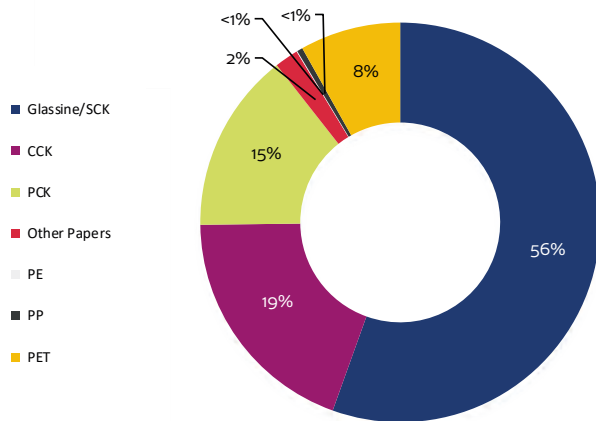
CELAB-Europe members:

Ahlstrom-Munksjö, Avery Dennison, BASF SE, CCL Label, Delfort, Dow Silicones Belgium, Elkem Evonik, Fedrigoni Group/Arconvert-Ritrama, Finat, Henkel, Iberica, Herma, Lintec, Loparex, Mitsubishi, Polyester Film, Mondi, Siliconature, UPM Raflatac, UPM Specialty Papers, Wacker Chemie

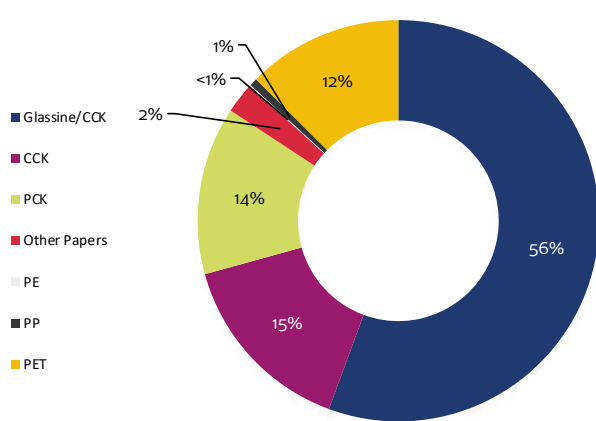
CELAB North America members:

Ahlstrom-Munksjö, Association of Plastic Recyclers, Avery Dennison, BASF, Dow Performance Silicones, Elkem Silicones, FLEXcon Company, Green Bay Packaging, Henkel, Innovia Films America, INC Kruger, Loparex, Mactac, Mondi Group, PolyPlex, TLMI, UPM Raflatac, Verso Corporation, Wausau Coated Products

Global Label Release Liner By-Product by Material
1,622,960 T



Global Label Release Liner By-Product by Material
26,490 mln sqm



Global release liner market: generation and recycling overview

“CELAB-Europe's goal is for over 75 percent of the used release liner and matrix material to follow a circular business model by 2025”

Finat and CELAB-Europe

'Finat is excited to host the European branch of this groundbreaking global initiative in its start-up phase,' says Jules Lejeune, managing director of Finat. 'For decades, our association has been active in raising awareness about the recycling of liner and matrix materials, and in promoting successful recycling solutions via our sustainability and recycling award.

'Finat brings together all the key players in self-adhesive labeling technology in Europe, from base materials up to the finished label and labeling technology, and I am proud and excited that our industry is now leveraging its resources collaboratively to take this important opportunity to the next level together with other stakeholders.

'Only with a collective effort that is shared across the value chain can we make a difference and contribute our part to achieving a circular business model for the labels and packaging industry in Europe.'

proprietary process information. The first of this series of documents, on paper liner recycling, has already been completed and is in the process of being shared with the wider self-adhesive label industry.

In turn, the regional branches create workstreams on various aspects of matrix and release liner recycling, including analyzing technical issues, promoting the use and creation of recycling networks and solutions, interacting with government regulators, and educating the industry and public.

L&L: What has CELAB-Europe achieved since February 2020?

Anzelma Hajro: Within CELAB-Europe we agreed on a vision, target and strategic objectives. CELAB's vision is to create a self-adhesive labeling industry which is increasingly circular by offering solutions and providing education to enable matrix and release liner recycling. CELAB-Europe's goal is for over 75 percent of the used release liner and matrix material to follow a circular business model by 2025. We aim to contribute to the development of cost-effective environmentally friendly solutions for pre-consumer waste. In doing so, we are establishing a representative self-adhesive label value chain organization to drive progress in meeting legislative and customer requirements. This way, we are utilizing the value chain to understand, build scale and collectively advance recycling solutions for matrix and liner.

In Europe, we have organized ourselves in four working groups (workstreams) with an overarching Steering Group. The original target was to kick off the project on the occasion of the Finat Technical Seminar back in March, but due to the pandemic, all workstream meetings so far have taken place online. In hindsight, this situation has enabled us to make big strides forward in defining the deliverables in each of the workstreams, and make progress in areas like market data collection, the identification and assessment of existing and potential recycling and logistics solutions around Europe, as well as the assessment of the regulatory framework around Europe relevant to the implementation of pan European solutions. All our activities are based on a governance agreement which identifies the terms of engagement for the members as well as the legal compliance with competition law.

L&L: What is required logistically to improve current recycling rates?

Juha Virravirta, UPM Raflatac and Logistics Workstream leader, CELAB-Europe Steering Group member:

There are a range of factors that CELAB has identified to improve recycling rates, ranging from education of the industry regarding the availability of nearby solutions, to raising awareness among brand owners and converters.

CELAB-Europe will play a role in guiding the industry by, for example, identifying the hot spots where waste is being generated. The collection and waste operators need then to take the role of actively developing the concrete solutions. CELAB-Europe will investigate new ways to transport waste, waking the interest of the established players in the waste markets, finding new agile operators and using digitalization. Of course, all solutions must be economically viable, or they won't be sustainable.

L&L: How is CELAB going to support the development of a sustainable business model for recycling?

Juha Virravirta: This is a work in progress. Via the CELAB-Europe Workstreams, different business models will be explored to understand the economics and environmental impacts of each potential recycling /reuse scenario. This understanding will be shared within CELAB so that the most relevant can be developed into fully fledged commercial solutions. Throughout this process CELAB will be careful to ensure compliance with competition law.

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Engineered fuels		Unchanged	↑	Unchanged	Unchanged	Unchanged
Recycled to create new products		↑	↑	↑	↑	↑

Changes in release liner disposal

L&L: What is the scale of the problem? How is liner and matrix waste currently disposed of?

Ralf Drache: While it is clear that our initial focus has been on liners, we should not forget about matrix. Within Europe, we are currently also collecting data about the amount of matrix materials generated by the label value chain. We will work with Finat in addressing the label printing community on this topic.

According to study last year commissioned by Avery Dennison for CELAB and conducted by AWA, there are 1.6 million tons of label liners sold worldwide, with a recycling rate into other material of approximately 20 percent. The numbers vary by region. In Europe, landfill in several countries has already been or will soon be banned, and compared to energy the focus here lies on the creation of secondary raw materials. For

paper liners, over 50 percent is being recycled to create new products, while 25 percent is being converted from waste to energy. For filmic liners, almost half of the volume (49 percent) is being converted from waste to energy, and one quarter is recycled to new products. The challenge is not only to increase the share and availability of recycling solutions, but to also help to upgrade the quality of recycling and demand for recycled solutions.



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CELAB is the first global consortium dedicated to recycling in the self-adhesive labeling industry

L&L: What is currently the biggest difficulty with release liner recycling?

Fernando Giron, marketing director for Pressure-Sensitive Labels Business Unit at Fedrigoni Group, Arconvert-Ritrama, and CELAB-Europe Steering Group member: The main challenge is to make the recycling economically viable, which is difficult to achieve due to a combination of two factors. Firstly, technical complexity: the liner's silicone coating and the high density of paper (for paper liner) require specific processing. The specific nature of the liner

could also lead to lower yield or lower grade recycled material. Secondly, transport cost: a large portion of recycling costs come from transport. The volumes of used liner are very fragmented and only a few specialized recycling plants are available in Europe, making the transport cost a real challenge.

Hence the need to find ways to increase the yield of the recycled liner material, and also the need for the whole value chain to collaborate to reach the scale needed to make this economically interesting and sustainable.

L&L: What are the markets for repurposed and recycled liner and matrix materials?

Fernando Giron: According to the release liner study done by AWA in 2019, current end markets include: recycled paper and cardboard, other materials such as cellulose fiber insulation material, and closed loop recycling into high quality papers. According to the same study, filmic liners are recycled into different composite materials but also new films.

The matrix is more difficult to recycle. Matrix waste is recycled to produce, for example, composite materials or blended into surface materials for roads.

CELAB will identify existing outlets make them more visible by label users, providing them with information on how to get the input material. In parallel, the workstreams will connect with companies specialized in matchmaking secondary materials to recycling solutions across industries, to expand the number of recycling or repurposing options.



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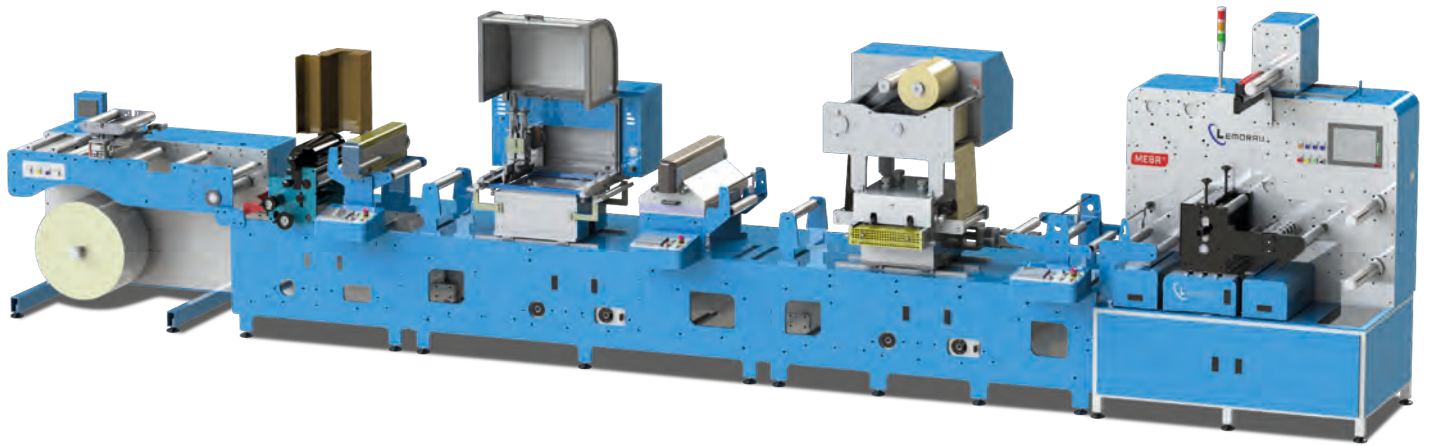
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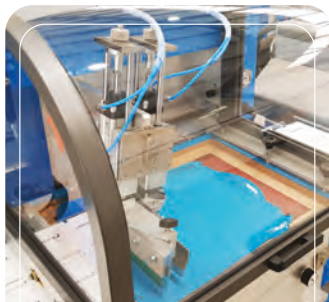


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The rebirth of Riber

Riber Etichette, based in one of the first European epicenters of Covid-19, is regaining its strength with sizeable investment and ambitious expansion plans. Piotr Wnuk reports

Riber has rightfully earned its status as one of the leading label converters in Italy. It produces some 7.5 million labels a day – for a long list of 250 customers spread all over the country – using nearly 5 million sqm of paper each year. The company operates two shifts and employs a team of 20 on its five production lines.

Today, Riber prints a wide range of adhesive labels with up to 12 colors on an extensive list of substrates – paper, special papers and plastic films – for virtually any type of application. Its labels can mainly be found on food products, but also household chemicals, wine bottles and medication boxes. It also produces anti-counterfeiting labels, Braille labels, and is an official distributor of specialty labels for forging and steel mills, where they are required to withstand high temperatures.

Riber Etichette was founded in 1992 in Brescia, in the Lombardy region, by two young friends and entrepreneurs, Michele Bersi and Paolo Rigato. With a background in the print sector, they decided to invest their experience in building a new business by committing to the highest quality of labels and focusing mainly on the local market.

The company became a popular supplier of food labels in the region, and they quickly accounted for some 60 percent of total production. Riber worked with famous local salami producers, butchers, farms, and various food businesses where the application of labels required very particular choices. Bersi and Rigato applied their experience in ensuring each material met the appropriate standard, but also the optimal printing definition and labeling speed.

“We started production on our new Synchronline right from Lombardi’s factory floor. It was a lifesaver”

‘Based in a small workshop, we started our label production on a 4-color Gallus Q33 letterpress. Due to our consistently and quickly expanding list of customers, we invested in a 6-color Omet press to keep up with growing demand,’ recalls Bersi.

Riber’s reputation quickly spread across Italy and contributed to the further



Riber Etichette and Lombardi worked closely together during the Covid-19 lockdown to maintain production



Lombardi and Riber Etichette teams at Labelexpo Europe 2019

expansion of the business. In 2009, the company moved to a larger facility, adding another printing machine to its pressroom to expand production capacity.

Only three years later the company has once again outgrown its headquarters and moved to even bigger facilities, simultaneously diversifying into screen printing and working with multiple colors on new Nilpeter offset and Omet 420 presses.

Game changer

The real game changer for Riber came in 2016 when the company invested in a Lombardi Synchronline 430, 10+2 color press.

‘We knew Lombardi by name, but we saw the company for the first time at Labelexpo Europe 2015,’ recalls Paolo Rigato. ‘We wanted to learn more about the new Synchronline with all the technical innovations aimed at productivity. We consider this machine the flagship press in all respects for a company like ours, which has always chosen the best technology, not only in the press, but also in quality control to ensure 100 percent reliability.’

The new press instantly increased the

level of quality and performance, and brought additional revenue. The Synchronline enabled the converter to print on paper and polypropylene at significantly higher speeds, often exceeding 90m/min (300ft/min). It also helped to minimize changeover time to a few minutes, thanks to a patented mechanical system that allowed print cylinder replacement without requiring changes to the supports.

Riber also reduced waste levels with the Synchronline’s quick start-up procedure, which supports its ongoing efforts to be an environmentally conscious company. It also uses FSC-certified paper and is associated with UPM Raflatac’s RafCycle program for the recovery of waste products.

Soon after the installation, the Lombardi Synchronline 430 won four awards at Best in Flexo 2016, organized by the European branch of the Flexographic Technical Association (FTA). Alongside Lombardi, Riber was also recognized for its work and finished second in combined use of hybrid printing with screen printing and cold foil and scooped the third prize in the narrow web category.

'The Best in Flexo award was very important for Lombardi, not only because our machine has been recognized by the FTA, but also because one of our customers has been awarded twice for the quality of the production achieved using our press,' says Nicola Lombardi, marketing manager at Lombardi Converting Machinery.

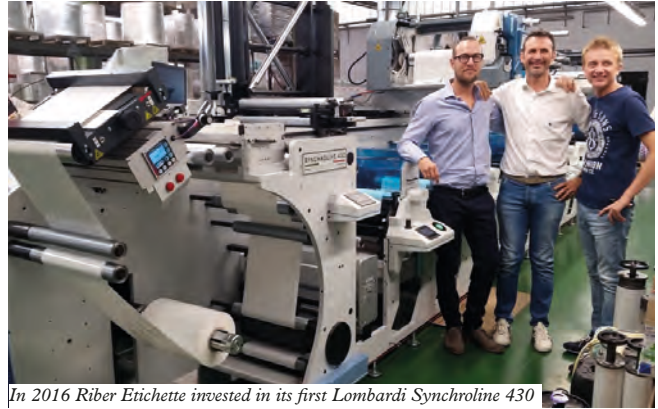
This recognition further accelerated Riber's growth and resulted in yet more investment. Shortly after celebrating its 25th anniversary, the company moved its headquarters once again. Its new, state-of-the-art production facility in Montirone near Brescia has been developed with Industry 4.0 in mind and houses production lines across 1,600 sqm (over 17,000 sq ft) with ample room for further growth.

This move to a new facility has also resulted in capital investment in new equipment. This time the decision was easy: the company founders turned again to Lombardi, based nearby, ordering one of its biggest machines: a Synchroline 430 equipped with 12 colors and two rotary screen-printing units.

The pandemic hits

As anticipation for the Synchroline's arrival grew, Covid-19 began spreading quickly across Europe. Lombardy was one of the first European epicenters of the pandemic and was hit with enormous disruption.

'We were all shocked and had to act quickly in order to survive the first wave of the virus,' recalls Nicola Lombardi. 'We knew that supplying our industry would be more important than ever, as the majority of label printers are an essential part of the supply chain. Despite being walking-distance from each other, we used virtual meetings and video calls to discuss the details of the new press and customize it to Riber's expectations.'



In 2016 Riber Etichette invested in its first Lombardi Synchroline 430

As the pandemic spread across Europe, Riber's founders quickly implemented a business continuity plan and adjusted to social distancing rules to continue playing an important role as an essential supplier.

'Our new machine was almost ready, but due to the lockdown rules imposed by the Italian government we were not able to physically install it at our production facility,' says Bersi. 'After a few discussions with the Lombardi family, we decided to start the production on our new Synchroline right from their factory floor. It was a lifesaver. We work for different companies in agriculture, food, detergents and pharmaceuticals, which have been allowed to continue their production. Thanks to the helping hand from Lombardi, we had the opportunity to increase the supply of our just-in-time labels.'

'The pandemic gave us the opportunity to reinforce our work



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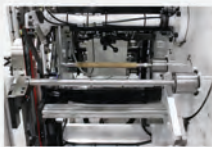
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In 2019 Riber Etichette moved to a state-of-the-art production facility in Montirone, near Brescia

within internal groups, protecting ourselves from the virus,' adds Rigato. 'We continued production and were also using our new press at Lombardi's headquarters. We strictly followed all the rules and adjusted our internal procedures to ensure everyone's safety. Our team of 20 did amazingly well under these circumstances and was imperative to our existence during and beyond the lockdown.'

As soon as lockdown restrictions were lifted, Riber received its new press and immediately started production. 'In a time of crisis, such as Covid-19, we need to unite and help each other as much as possible. We were happy to create this amazing synergy with Riber,' says Nicola Lombardi. 'It is a pleasure to be associated with a company with such a fresh outlook, ambition and the constant drive to expand its brand. For us, this Synchronline order will always be special for several reasons. It happened at a very difficult time, but also marked the first equipment purchase since Covid-19

“We knew that supplying our industry would be more important than ever, as the majority of label printers are an essential part of the supply chain”

spread around the world. It showed us that the industry can survive the crisis. We can now restart our economy and think about a bright future.'

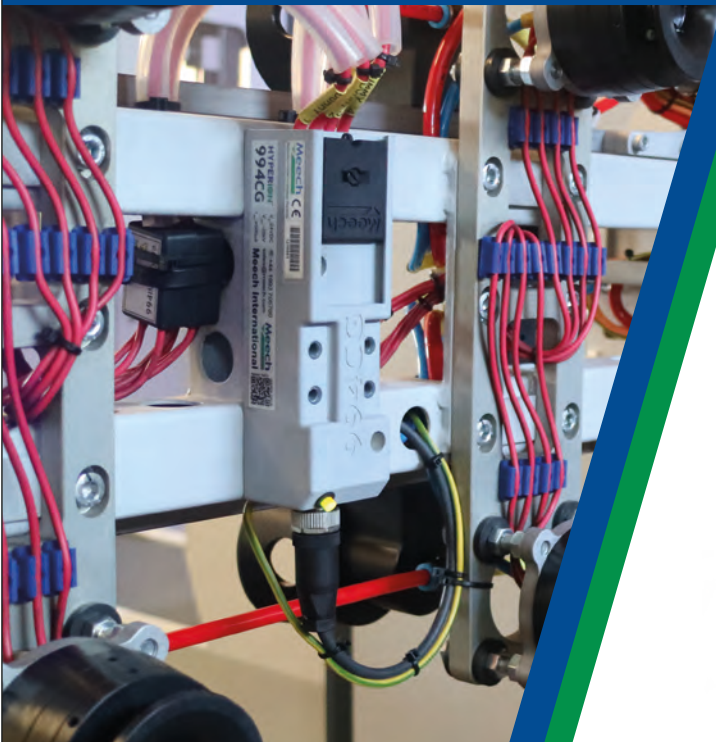
As the world faces a second wave of the pandemic, the label industry is ready and better-prepared to play a crucial role in supply chains around the world. The last few months were not easy for any business, but Riber's resilience is now combining with ambitious future plans.

'Thanks to the new Synchronline press, we will be able to extend our activities and further increase our production capacity. This time we also have a very ambitious plan. We want to expand our brand and our production to other European countries. We are hoping that the use of social networks and the virtual events we are taking part in mark the rebirth of our industry, will help us to increase our penetration into the main European market,' concludes Paolo Rigato.



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MacArthur Corporation adapts to change

Covid-19 forced many label converters and suppliers to examine their operations. Michigan-based MacArthur Corporation took a smart and measured approach. Chelsea McDougall reports

Of all the words used to describe doing business in 2020, smart leaders often use the word 'pivot.' From production lines, to customer service, sales and marketing, innovation and product development, label converters in 2020 know this word all too well.

Perhaps no one company epitomizes that word better than Michigan-based MacArthur Corporation, which enacted many changes as the Covid-19 pandemic forced the company to examine all the ways it does business.

Early in the pandemic, MacArthur Corporation got its hands on a CDC flu pandemic business planning checklist from 2005 that offered a solid framework for immediate steps to implement.

MacArthur Corporation president Thomas Barrett says: 'I certainly can't claim we were prepared for Covid-19, but I do feel good about the fact that we were able to leverage some of the things we put in place at the business ahead of time that allowed us to react quickly.'

“The biggest challenge was all these little interactions that we do every day at work”

'What we were not expecting and what we were unprepared for was the speed at which the pandemic developed – from something we were keeping an eye on to something we really had to react to quickly, almost in crisis mode.'

First, the leadership at MacArthur Corporation took advantage of a recently revamped IT infrastructure that allowed its office staff to work remotely without major disruption. But how to keep MacArthur's essential employees safe from a highly contagious disease was another matter entirely.

Production floor

MacArthur Corporation was deemed an essential supplier through the pandemic, so it did not shut down. But this also meant it had to change how its employees interact with each other on the factory floor.



MacArthur Corporation is based in Grand Blanc, Michigan

'The biggest challenge was all these little interactions that we do every day at work – quality checks, going to pick up paper from the printer, for example,' says Barrett. 'All these small interactions where people are moving around the plant.'

'That was really the difficult thing to get used to from a social distance point of view. People are so used to working in close proximity to each other. These are all elements of human nature. We're used to being in close when we're working on something together, so educating our employees has been the biggest impact. Trying to keep people at their workstations for an entire day also creates some inefficiencies. Those are difficult habits to break. Fortunately, we have an amazing, adaptable and committed workforce that has worked hard to stay safe.'

MacArthur now reads temperatures of employees entering the building; it enforces mask wearing and 6ft (1.8m) social distancing rules; it has put physical barriers between workstations and limited the amount of movement during a shift to minimize interactions. The company has staggered breaks and encouraged them to be taken outside when possible. It has increased cleaning and installed touchless water faucets and paper towel dispensers. It also took big steps such as installing an anti-germicidal ventilation system in its HVAC, and smaller gestures like propping open doors to avoid high-touch areas: 'It's a small

thing, but it has a big impact,' Barrett says.

Office pivot

The production floor wasn't the only place where MacArthur Corporation had to pivot. CEO Christie Wong Barrett immediately noticed the changes with a sales team unable to travel to meetings or tradeshows and instead relying solely on virtual contact with customers.

'Our conversations with customers pivoted,' says Wong Barrett. 'It used to be about what's coming up in the future that we can work on with you today? Now our conversations are around safety, plant operations, where they are shutting down, what do they need help with immediately, are there any supply chain issues or launches that are behind?'

'It's really become a high-response, higher-frequency approach to customer service and sales. We're helping customers with whatever problem comes at them at the moment.'

MacArthur Corporation has a fleet of 11 flexo presses and an inkjet press to produce pressure-sensitive labels, RFID labels and tags for the automotive, industrial, electronics and medical technology industries. Its specialty is performance specific-labels and it relies on an on-site testing lab for gauging performance of its products in harsh environments.

The company is a leading supplier to the automotive industry, which nearly came to

MacArthur Corporation offers 'Safe at Work' product line

MacArthur Corporation created a 'Safe at Work' product suite that brings together its strengths as a printer and expertise in durable materials to create products catering to those dealing with the Covid-19 pandemic. Safe at Work offers antimicrobial self-adhesive films for high-touch surfaces, 'to give an extra layer of security in between cleanings,' CEO Christie Wong Barrett says. 'It kills up to 99.9 percent of germs on a surface.'

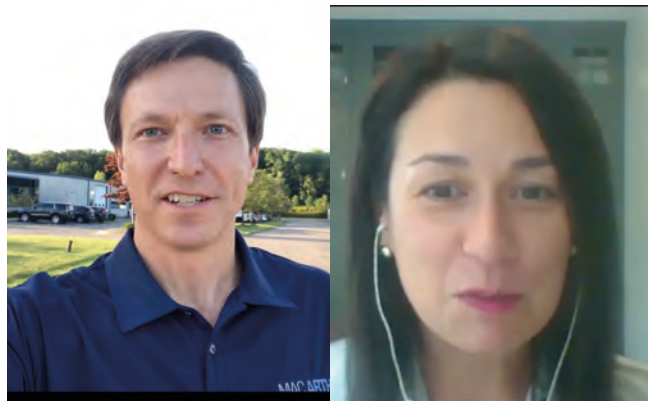
Further, MacArthur began offering stick-on face masks to the beauty and wellness sectors, an area the industrial printer didn't play in before the pandemic.

'Our largest market right now for face masks is for beauty professionals. Beauty professionals and their clients see benefits to the no-strap mask design,' Wong Barrett says. 'We're a supplier who works primarily with the automotive, electronics, and medical technologies industries, so beauty brands were completely new for us.'

a standstill in late March for two months.

MacArthur Corporation had to be ready to respond when its automotive customers came back online. (The automotive industry has since rebounded to nearly pre-pandemic levels, Wong Barrett says.)

Meanwhile, the medical technology industry, which MacArthur also serves, was surging in some verticals. Many of those customers were crucial in the early days of the pandemic, particularly those which manufacture complex medical equipment such as ventilators.



Thomas Barrett and Christie Wong Barrett at the Virtual Label Summit

'Medical device orders were 10 to 100 times what they would normally be in a non-pandemic environment,' says Wong Barrett. 'A lot of complex medical devices have thousands of part numbers produced in a scale of, say, 100 per month. Early on in the pandemic, these same customers needed tens of thousands of devices in three months. There was no supply ecosystem that could do this. It all had to be built immediately and with urgency, because every day you delayed getting a ventilator into the market was a day that 100 lives might be lost.'


MacArthur Corporation helped its customers scale 100,000 ventilators within a 90-day window. It was a project that truly brought together ingenuity, scale and speed, she says.

'It's amazing to be part of that as a critical infrastructure supplier of labels for these ventilators,' Wong Barrett says. 'We knew we


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needed to service medical technology and help fill that eco-system gap. We were in the right place and had the right team and right supply chain partners to get it together.'

The key to being successful on that project, she says, was flexibility. 'Wherever we can be flexible and agile and ready, that's where we were able to be successful. The ability to be flexible and react very quickly has been a huge asset for our company. I think we were able to rely on our team to address issues quickly and that's truly been an asset.'

'There are a lot of different metrics used to measure business efficiency and what makes a good operating system,' says Wong Barrett, who prior to becoming MacArthur's CEO was a global consultant for advanced manufacturing industries at McKinsey & Company. 'Looking ahead, this concept of flexibility and agility will undoubtedly be added to that list.'

'Being flexible is what helped us make it through the beginning of the pandemic and it's allowing us to continue to stay sustainable throughout the pandemic. It allowed us to react to disruptions quickly so our customers didn't feel any pain.'

History

MacArthur Corporation was founded in 1970 by Jack MacArthur after he retired from a 30-year career at General Motors. At this time the auto industry was increasing its use of labels for traceability, especially barcode labels which were a developing technology, and MacArthur grew with this trend.

In 1986, Tom Barrett Sr (Thomas Barrett's father) joined MacArthur Corporation as a sales manager, and in 1991, he bought the company with his business partner Dennis Patrick.

The younger Barrett joined the company in 2005 after a

successful career on Wall Street and with Fortune 500 technology companies. In 2007, Thomas bought Patrick's share of the company.

"The biggest challenge was all these little interactions that we do every day at work"

Then came the financial crisis of 2008.

'It was quite an amazing introduction to business ownership,' Barrett says. 'Being a first-time business owner in the beginning of 2008, then having the bottom drop out, and the whole economy in tatters eight months later. I often say after living through 2008 and 2009 I learned an incredible amount about business and leadership. But I don't ever need to learn that much again. That was a once-in-a-career experience. And yet, here we are again. I'm hoping that I'll be retired by the time the next "lesson" comes around.'

Christie Wong Barrett joined MacArthur to lead corporate development in 2011 after careers in engineering, consulting and business unit leadership at Raytheon and McKinsey & Company. In 2012 she invested in the company and succeeded Tom Barrett Sr as CEO.



Christie Wong Barrett and Thomas Barrett both participated in the recent Virtual Label Summit hosted by Labelexpo and Labels & Labeling. To watch the sessions, visit: www.labelsummit.com/virtual

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Before and after: the new plant in Goa set up by Kumar Labels



Kumar opens Goa factory

Indian converter Kumar Labels set up the new factory remotely and hosted a virtual inauguration. Aakriti Agarwal reports

Kumar Labels has expanded operations with a new factory in Goa located on the west coast of the Indian sub-continent. Spread across an area of 3,000 sq ft (280sqm), with space available to treble in size, the factory was set up remotely during the lockdown.

The Indian converter had invested in a disused warehouse in early 2020 but the planning phase was interrupted by the lockdown. Undeterred, Anuj Bhargava, CEO of Kumar Labels, decided to press ahead. With the help of a contractor, they drew highly detailed plans of the layout, including specifics such as pneumatic and electric lines, water pipes, and other important aspects.

'We didn't have anyone to oversee the project. The contractors were local and we worked through video conferences. We gave them 3D views of each fixture and asked them to follow our measurements and execute our orders. They would call me five to six times a day for questions and procedures,' says Bhargava.

The company has maintained the same look and feel in the new factory as its headquarters in Noida. 'All our flooring material, ceilings, electrical fixtures, panels and other things were transported from the north to the west of the country in trucks. Due to a shortage of labor and the unavailability of forklifts at the time of lockdown, we sent the contractor trucks' bed layout so they knew exactly how to unload material in a sequence and place them at the right spot without unnecessarily unpacking them. Each item was labeled with numbers and names and detailed installation instructions were sent. Each step was planned down to the tiniest detail so it got executed precisely. In the end, what matters is that it all worked,' smiles Bhargava.

Despite the success, there were hiccups along the way. Bhargava did not consider the salty, sultry weather conditions of coastal Goa. 'We sent galvanized iron pipes for water connections and plumbing, instead of using plastic pipes at the coast. Secondly, we realized strong air-conditioning was not required here. Thirdly, it rains so heavily that we had to build a shed to house the diesel generator so it can be switched on or off during heavy rains. Lastly, like any new set-up, we faced some human resource challenges with the local

Labelstock patented

Kumar Labels has been granted two patents for its SRTF ('single-release with two facestocks') labelstock. Manufactured by Kumar Label's brand HassleFree Technologies, it sandwiches silicone liner between facestock that can be printed on both sides. 'Not only does the SRTF labelstock enable reduction in storage and logistics cost, it is also an environmentally friendly product that ensures less waste generation,' says Bhargava.

"Our objective is to move closer to the customer"

workforce which were ironed out with time and patience,' he says.

Once the factory was set up, Kumar Labels sent a team of five people from its Noida plant to Goa to install presses and ancillary equipment, and to conduct trial runs.

The plant runs Kumar Labels' first UV LED Multitec press, which was sent from its Noida factory, as well as new finishing equipment. 'We saw companies working with 100 percent UV LED in China. There is no reason why we shouldn't do it. UV LED enables fantastic running, fast drying that results in 25 percent better speed and 50 percent power saving. We are seeing results in Goa and are now in the process of switching to UV LED on our other presses in Noida,' says Bhargava.

Virtual inauguration

Kumar Labels hosted a virtual inauguration of the new plant that was attended by customers. 'We hosted a virtual plant tour and ribbon cutting by a customer,' says Bhargava. 'To ensure safety, the ribbon was tied on two wine bottles and cut at the customer's house. He cut the ribbon during a video call and said "Start", after which the press in Goa began running commercial production.'

The company is printing pressure-sensitive labels, cut-and-stack beer labels, pharma labels and shrink sleeves from this plant. 'Our objective is to move closer to the customer to ensure shorter turnaround time and just-in-time delivery without any logistics issues. With a railway station and port close by, the location presents an opportunity to not only send labels around the country but also export to western Europe,' explains Bhargava.

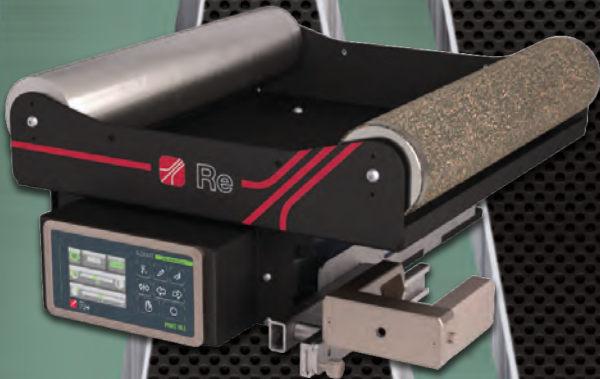
Bhargava has a vision of working on 'hub and spoke' model of running plants. While 2020 enabled the first step in this direction, next year will see Kumar Labels, which employs 130 staff across India, expanding with two smaller plants. 'The factory in Greater Noida will remain the hub with labelstock and ancillary equipment manufacturing, research and development, as well as label printing. The new units will work in close contact with local customers and ensure quicker deliveries,' he says.

'I believe the current pandemic has done us good because it reinforced my vision that translated to a decision that we could execute. We saw a lot of new accounts that came to us because we could deliver. Being closer is a natural choice for customers.'



For more from Aakriti Agarwal on the Indian market, go to www.labelsandlabeling.com/contributors/aakriti-agarwal

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Opportunity out of adversity

During the lockdown, ink manufacturer DIC India found innovative new ways of connecting with customers. Aakriti Agarwal reports

DIC India faced major challenges during the lockdown as it witnessed a significant change in consumption patterns. The ink supplier, however, has seen success by re-strategizing and finding new ways to connect with customers.

Since DIC India caters to both the packaging and publishing industries, one of the major challenges it faced was reinventing the raw material mix to continue seamless service to the market. Manish Bhatia, CEO and managing director at DIC India, says: 'China started going through the Covid crisis in January so there was a concern about a disruption in the supply chain. We spent the first quarter planning our raw material inventory so that our service wouldn't falter. However, the first lockdown happened in a manner that the consumption simply stopped in most places. Our whole raw material mix underwent a serious change with the publication business going blank for a few months, and the packaging business picking up pace.'

“Some product segments have seen a V-like recovery whereas others are still witnessing a muted recovery”

Many companies faced a similar challenge and learned to adapt their manufacturing capabilities and raw material planning. 'The demand is changing again now as the country is opening, but in a lot of segments demand patterns are very inconsistent. Some product segments have seen a V-like recovery whereas others are still witnessing a muted recovery. Consumption patterns are beyond our control but we are keeping a close eye and are working closely with our Asia Pacific office to create raw material inventory in India and abroad that allow for swings in demand,' says Bhatia.

Unlike many factories across the country, DIC India was able to restart manufacturing as early as April 2. The first lockdown in India was announced from March 24. Bhatia says: 'We could start operations principally because we were supplying to a lot of



DIC India's factory in Noida

converters who cater to leading brands in the FMCG segment. The Indian government ensured essential commodities such as milk, cereals and other condiments were not stopped during the lockdown, which enabled us to start operations.'

Another advantage is DIC India's geographic spread of factories: in Noida, Bengaluru, Ahmedabad and Kolkata. 'Most of our product categories have two sources of manufacturing,' explains Bhatia. 'In February and March, we prepared ourselves and ensured the availability of raw materials and finished goods at two different locations. So, when the authorities in Noida were strict on manufacturing operations, the Kolkata plant ensured deliveries were completed. When the authorities announced a containment zone close to our factory in Kolkata, we asked our workers to stay at home and another factory took over. So, we did not default our supplies. However, there were challenges because there were instances of trucks standing still on the roads. The supply chain disruption caused severe cost pressures. We at DIC put our customers first, and despite a significant increase in costs, we ensured the deliveries were fulfilled without any delays.'

Konnect-ed with customers

DIC India further connected with its customers using a digital platform, DIC Konnect. Using this platform, the company advised converters on how best to restart operations after the lockdown, with minimal risk to employees. 'We put together a plan to unlock factories, and connected with around 250 converters during more than 70 sessions to open up factories with minimum wastages and

Staff safety

DIC India doubled the medical insurance policies of its employees in the second quarter when they observed rising healthcare costs. 'The safety of all our employees remains paramount for us,' says Bhatia. 'We have been following a strong safety protocol at all our manufacturing plants.'

'We opened offices with 30 to 50 percent capacity and teams were divided in two shifts and worked alternate weeks. Further, employees can access 24/7 medical advice from the company's designated doctors. DIC India further provides private buses filled to 25-30 percent capacity to ensure social distancing for employees. They are also encouraged to use private vehicles.'

'All employees go through thermal scanning every time they enter the factory. Thereafter, they get a pair of fresh gloves and surgical masks which are changed each time they use a restroom. Usage of face masks is also compulsory, and there is strong disciplinary monitoring.'

Employees working from home are provided with a facilitation fund to ensure they can arrange any specific requirements such as internet connection, desks and chairs, among other things. 'It's not easy to work from home. Not everyone has an abundance of facilities. Hence, we requested employees to be active at home with housekeeping responsibilities to support their respective families.'



DIC India's adhesive manufacturing plant in Bengaluru



Manish Bhatia, CEO and managing director of DIC India

“Most of our products have two sources of manufacturing. In February and March, we ensured the availability of raw materials and finished goods at two different locations”

risks. Some of these interactions gave us good insights into their requirements,’ says Bhatia.

Thereafter, the company used the same platform to create awareness about the ban of toluene inks in India. Brands and converters needed to understand what this law entailed.

Further, in October, DIC launched a mobile application, DIC Ink Master, to address converters’ day-to-day operational queries, without any physical engagement. The app lists possible operational problems and solutions related to lamination adhesive, news inks, flexographic, gravure and offset printing. It also offers a dedicated ‘Raising a query’ section that allows customers to request guidance on new problems they face. The app is monitored 24 hours a day, 365 days a year, by an assigned team at DIC India.

‘The app also enables them to take a picture using their device and send it to our team for any assistance. We have been responsibly partnering with the industry and received a very positive response from both converters and brand owners,’ says Bhatia.

Trends

Interactions with all stakeholders provided an insight in the massive shift in consumption patterns. The proportion of small to big packs have undergone a change. With the hotel, restaurant and catering (HoReCa) industry affected by the pandemic, the sale of big bulk packs have declined significantly. Citing an example, Bhatia explains: ‘The 50kg pack segment has shrunk significantly but the 5kg and 10kg segments have shot up. However, for segments such as cheese, butter and some cereals, there was some bulk buying. But a lot of cooking shifted to people’s homes. As a result, the retail packs have flourished. The consumer involvement is much higher, and brand owners think it is likely to continue. This has led to a move towards more sustainable packaging with water-based products. Brands and converters are getting ready to accelerate the shift towards sustainability going forward.’

The company also sees growth of small SKUs that entails different requirements from ink manufacturers compared to bulk production.

Bhatia adds: ‘Local brands that service tier-2 and -3 cities are performing better than in pre-pandemic days. Therefore, non-metro demand is exceeding the metro demand after the initial stocking up due to lockdown normalized.’

Products such as whole wheat flour in India are not packaged on a large scale because people in tier-2 and -3 cities traditionally

prefer freshly milled flour from local shops. ‘However, we see a trend in increasing number of products being packaged now due to safety and hygiene issues. Increased e-commerce has also enabled tracking of products,’ says Bhatia.

The Bureau of Indian Standards (BIS) banned the usage of toluene inks in food packaging, which will drive a shift in the usage of inks. Many converters who were producing baseline vinyl-based packaging for flexible packaging are now evaluating between non-toluene and polyurethane-based inks.

‘The difference in cost is 5 to 10 percent. So, Indian brands that are exploring opportunity for export to Western economies are now thinking of shifting labels and packaging to safer inks. Therefore, there is an increased interaction with brands, especially large food companies, about shifting to greener and more sustainable options such as water-based inks. While these developments could take a couple of years to materialize, some converters are carrying out trials and are at an advanced stage of making a shift in their portfolio,’ says Bhatia.

While there are positive developments, India’s GDP is projected to contract by 10.8 percent in 2021-22. Bhatia agrees: ‘Most companies have delivered healthier results in the third quarter compared to the second quarter. There was an initial surge in our segments in July and August which seems to have flattened a bit. Results in the fourth quarter will depend on how the virus is managed and the introduction of vaccines. Companies will hit a rock bottom baseline in the next fiscal.’

Expansion

With all its challenges, the lockdown also gave many companies the opportunity to expand operations. DIC India took the opportunity to increase its activities for CI flexo by 50 percent in recent months. ‘We have augmented our non-toluene, non-ketone inks factory set-up within the Noida factory that is completely isolated from other operations. We also implemented the Kaizen concept on the production floor to de-bottleneck the adhesive plant in Bengaluru,’ says Bhatia. Bengaluru is the company’s center for export of adhesive to Southeast Asia. Further, DIC India bought a sizable plot of land in Gujarat a couple of years ago and is actively evaluating further expansion.



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Anti-counterfeit boost in China

Combining digital printing with unique anti-counterfeit label technology has boosted Chinese converter Hongyuanqing's long-term development prospects. Yolanda Wang reports

Shenzhen Hongyuanqing specializes in anti-counterfeiting products. With its recently purchased Haotian HTS-220-5C inkjet press and a self-developed composite nano anti-counterfeiting material made visible with water and with color-change reversibly, it has started a new phase of 'digital + anti-counterfeiting' label printing.

Founded in 2001, Hongyuanqing's business is divided in two parts. One division focuses on developing anti-counterfeiting materials, the other on print production of anti-counterfeit labels, which now account for 80 percent of total business volume.

“Digital printing is a better choice to give full play to the added-value benefits of anti-counterfeit labels”

With support from Tsinghua University's Institute of Nuclear and Energy Technology, Hongyuanqing has successfully developed a variety of anti-counterfeiting products, which have won more than ten national patents. Among these, 'Nuclear track/trace and anti-counterfeiting technology' was listed as a 'National key sci-tech project' by the Ministry of Science and Technology. Its self-developed composite nano anti-counterfeiting material meanwhile is a world-leading innovation in anti-counterfeiting materials.

Having developed this unique material, Hongyuanqing then considered how to turn it into practical label products with appropriate printing technology, carrying out trials on conventional and digital presses. 'We were successful using conventional printing technology, and the final products would be easily accepted by customers and the market,' said Wang Jingyan, general manager of Hongyuanqing. 'However, considering the features of this new type of anti-counterfeit label such as individual identification and security as well as customization, we think digital printing is maybe a better choice to give full play to the added-value benefits of anti-counterfeit labels'.

For this reason Hongyuanqing installed a Haotian HTS-220-5C inkjet press in October 2019, where it joined three Haotian letterpress presses. This was the first installation of this new press model in China. 'The investment in digital printing has profound implications for our future development,' said Wang. 'It's not only for our current production requirements for anti-counterfeit labels but also our future development plan. Before this purchase, we investigated and compared almost all digital printing technologies on the market. As a stress-free, non-contact and plate-free printing method, inkjet has few limits on printing stocks, so it's suitable for printing anti-counterfeit labels.

'We decided to buy Haotian's HTS-220-5C press for three reasons: first, cost advantage. Various materials can be used on this machine such as paper, PVC, PET, PE, BOPP and gold/silver foils with no need for precoating. This not only reduces work but also lowers costs. Second, performance stability. The imported environmentally friendly ink has good color rendition and rarely blocks the nozzle. Finally, the energy-saving and sustainability features. The digital press produces no toxic substances or VOCs during production and the overall environmental index is much higher than officially stated "green" printing standards. So this is much more suitable for



Haotian HTS-220-5C inkjet press installed at Shanghai-based Hongyuanqing

future printing demands.'

Wang says he is looking for a long-term relationship with Haotian, which has engaged in R&D and production of label presses for more than 20 years. 'We established mutual trust with Haotian by buying its letterpress machines. Their excellent quality and strong after-sales service, and especially their pioneering spirit, encouraged us to keep developing more valuable anti-counterfeiting products with them.' The digital press entered production soon after being installed. Since then Hongyuanqing has developed several 'digital + anti-counterfeiting' label products with the machine, opening up new market opportunities.

Turning point

Hongyuanqing operates in a factory with a floor area of over 3,000sqm and employs more than 20 people. The anti-counterfeiting labels it produces are mainly used in applications for high value wine, lubricants, household chemicals and event tickets.

The installation of the Haotian HTS-220-5C has led to a growing number of digital orders. Despite the absence of many employees during the Covid-19 outbreak, Hongyuanqing's business suffered less thanks to the digital press.

However, the 'butterfly effect' of the epidemic brought new considerations for Wang and her team. She tells L&L that the company was forced to consider how they might reduce the management risks brought on by the crisis. 'We focused on business generation, receiving both online and offline orders, and we created diversified management roles while enhancing communication with customers. We also focused on studying technology, supporting our conventional printing operation with digital printing, extending our product line and providing "one-stop" anti-counterfeiting solutions for customers. There must be a turning point in the crisis and the key is how to make good use of existing resources to create new opportunities. "Digital + anti-counterfeiting" is just one of them.' She also thinks that as the virus is brought under control and restrictions are lifted, 'human contact will then become intensive again, and demand for labels for the supermarket, FMCG and entertainment industries will explode.'



Haotian's inkjet press can be seen at Labelexpo South China 2020. See www.labelexpo-southchina.com



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Yulong offers digital and conventional one-stop shop

Yulong Printing is color matching between digital and conventional presses to deliver packaging buyers a one-stop shop experience. Yolanda Wang reports

Founded in 2004 with over 30 million RMB (4.5m USD) investment capital, Yulong Printing produces a wide range of products including leaflets, posters, photo albums, tags, pouches, cartons, user manuals and various types of adhesive labels.

Today Yulong Printing has 70 employees and a factory floorspace of 2,500 sqm. Annual output value in 2019 was up to 25m RMB (3.8m USD).

Labels now account for 35 percent of Yulong's total business, with the proportion of paper to film labels at 60:40. The main end use markets for label products include household chemicals, food and beverage, sanitary, textiles and garments.

The company's conventional machinery pool includes a Ryobi 4-color press, a Heidelberg CD74 5-color press, one 6-color semi-rotary offset press and a range of post-press equipment.

“The color in digital printing remains more stable and consistent over multiple production runs and among different batches”

Back in 2016 Yulong Printing installed the first Xeikon 3020 digital press in Fujian Province, and the big story is how the company has integrated digital with its existing conventional presses. Comments Li Haiyin, Yulong Printing general manager: 'This is Xeikon's entry-level 5-color 10-inch wide digital press. We purchased this machine mainly to meet the needs of increasingly short-run orders. Besides this, the maximum width of our existing coating, stamping and die-cutting production lines is also 10 inches, which perfectly matches with the width and speed of this machine.'

Intelligence

Li says the high degree of intelligence and automation in the Xeikon press has been

a key feature. 'Where with conventional presses the final printing result and product quality depend to a large extent on operators' experience, the Xeikon press is very easy and simple to run, which significantly reduces the dependency on operators.'

'The color in digital printing remains more stable and consistent over multiple production runs and among different batches. This brings tremendous benefits to our customers who can order in batches only when they need the labels. This facilitates more flexibility for our SME customers. Digital printing brings dual benefits, since it also shortened our order processing time, especially for those orders with tight lead times.'

Because the Xeikon 3020 digital press uses heat to fuse dry toner particles to the substrate, this puts certain performance requirements on adhesive materials – especially the need to prevent adhesive spreading after the heating process.

In spite of this, Li is still happy with the range of materials the press can handle. 'The Xeikon 3020 digital press has a very extensive application scope allowing us to handle materials such as PP, PET, PE, paper and metallized paper. The Xeikon ICE toner also gives us confidence for thermal-sensitive materials.'

Li gives a very interesting cost comparison of digital versus conventional printing. 'Calculating the investment amount, material and consumables costs only, current digital printing costs are undoubtedly higher than conventional printing,' says Li. 'However, as a corporate leader, I need to consider things from all aspects. Once you take into account the cost of operators, plate and materials, lead time and unit cost, we find digital printing has clear overall cost benefits when manufacturing short-run orders.'

Yulong Printing has also successfully developed a variable data and personalized label printing business for the Xeikon 3020 digital press.

Recently, the company has been exploring a new business model which combines digital and conventional printing. 'We initially intended that digitally printed labels and conventional package printing would be two separate business units,'



Xeikon 3020 digital press installed at Yulong Printing

explains Li. 'However, as our business developed, we found many brand owners require both labels and packaging. As a printing service provider, we can strengthen our relationship with customers by meeting their different packaging demands at the same time.'

The digital press currently fulfills 90 percent of Yulong's label orders, says Li. 'We use digital for label orders less than 200 meters, except where label products require spot colors.'

After the outbreak of Covid-19, the demand for anti-epidemic products such as disinfectant and sanitizer labels increased sharply, which helped make up for the loss of other business due to the epidemic. Indeed, Yulong Printing's business volume in the first half of 2020 was almost the same as in the same period of 2019.

The sudden outbreak of the epidemic had a profound impact on Li's thinking. 'I realized that in the future our company must grow towards digitization of production with higher automation and less human intervention.' For this reason, Yulong Printing plans to invest in hybrid press technology which combines both digital and conventional technology as well as investigating digital die-cutting.



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



Predictions for 2021

Industry experts look at the major trends and developments we are likely to see in 2021

Jeroen Diderich, VP and GM, Label and Graphic Materials North America, Avery Dennison

While sustainability issues were somewhat overshadowed by the events of 2020, the importance of sustainability to consumers will gain momentum in 2021.

Intelligent labels will also play a key role in 2021 as they enable the revolution that is occurring in retail. E-commerce is a prime beneficiary of this revolution and intelligent labels provide retailers and consumers with the supply chain visibility that is essential to the continued growth in this segment.

The disruptions that occurred in 2020 have accelerated the major trends that were already occurring in labeling. At Avery Dennison, our innovation strategy has been focused on advancing the circularity and intelligence of labels and those attributes will become more important than ever in the coming year.

Jakob Landberg, sales and marketing director, Nilpeter

Covid-19 has no doubt presented an entirely new challenge, both for personal and business relations, but Nilpeter predicts a bright future ahead. After a gentle start to 2020, for obvious reasons, it seems the printing industry is recovering quite well. Printers experienced a quick rise in demand for labels and flexible packaging,

“Sustainability in this wider sense will mean above all the automation of all processes which require key operator skills”

and now, the investment climate is back on track.

In 2021, we predict the steady growth in labels and flexible packaging will continue, and furthermore expect increased demand for more efficient production, based on new, modern technology and equipment.

We have seen a great deal of focus on the actual print operation, making sure the operator experiences an attractive, modern user interface, and that should continue in the new year.

Printers will look to create a competitive advantage through new value-added technologies and efficient production parameters – faster job settings, job changeovers etc.

Marco Calcagni, sales and marketing director, Omet

Recently, strong changes have affected the market. The way of working, the needs of customers, the approach to suppliers – all these have radically changed. People travel less, and meetings are mostly virtual: at first, everything seemed difficult, but the result is greater efficiency and greater speed in communication and problem solving. Packaging, in general, has not suffered any decline: it has remained stable with some increases in the food sector. It was forbidden to go to restaurants or on cruises, but people have not stopped eating, so they turned to supermarkets: buying packaged goods and producing an increase their demand. This didn't immediately result in an increase in the investment market, where Omet operates, but it balanced the fear of the future.

Eli Mahal, head of HP Indigo Labels and Packaging

The healthy growth of HP Indigo labels and packaging printing that we saw in 2020 is expected to continue in 2021, with some verticals such as food, beer and cleaning products experiencing particularly high demand. While the pandemic will be over sooner

or later, it has certainly kickstarted several mega-trends that provide a tailwind to digital print: these include an increased need for agile supply chains, fast time-to-market and a versatile digital press. The trending rise of small brands and local manufacturing looks set to continue. 2020 has proven the need for a digital-first mentality, as the industry moves quickly to cope with new demand. Investing in the right set of technologies now will pay dividends in the future.

Colin LeGresley, managing director, Aztec Label

It's clear that 2021 is shaping up to be a challenging but exciting year. There is likely to be further demand fluctuation as the pandemic continues and likely recession bites, but importantly, sustainability is likely to return to the top of the agenda.

At Aztec, we have already been investing heavily in automation and a number of initiatives to reduce waste and boost our environmental credentials, but I would expect more converters to follow suit as brands refocus their efforts on environmental objectives. In line with this, I am also expecting to see more innovation from material suppliers in terms of sustainable substrates, adhesives and finishes.

Finally, due to the variability in demand seen in 2020 and the need for printers to react quickly to market changes, I believe the push toward digitalization and automation will continue in 2021.

Harri Janhunen, vice president, strategy and commercial development, UPM Raflatac

During the pandemic, our value chain has proven robust. We have served essential industries without disruption despite demand volatility and multiple simultaneous forces shaping our industry. Consumers have driven accelerated growth in e-commerce, grocery shopping, food takeout/delivery, as well as increased focus on hygiene and sanitation. New innovative uses for label materials have emerged: labels on pizza boxes, hotel rooms and rental cars to give assurances to the consumers that things are safe. Lastly, existing trends such as sustainability have continued unabated.

We still see sustainability as one of the megatrends that will surely continue to strengthen in 2021. UPM Raflatac believes that 'labels matter' when it comes to sustainable packaging materials and tackling climate change.

Richard Knight, CEO of A B Graphic International

It's inevitable that some industries and sectors will thrive, while others will decline. Labels, however, seem to be faring better than many. I strongly believe that working from home is here to stay, perhaps in a hybrid form, and there will also be a reduced importance on physical office space.

Healthcare solutions will continue to increase: warning labels, hand sanitizer labels, drugs and vaccines labels. Automation will continue to grow in importance as it has over the last few years. The growth of smaller online retailers will only continue to fuel the need for the short run digital offer and the growth of digital embellishment will allow this to grow.

Increased online shopping creates a massive increase in the need for shipping labels. With less traffic through restaurants and bars, there is the potential of a decline in high-end wine and spirits labels in some markets. With new car purchases suppressed, there is a reduced requirement for durable labels and likewise with the aviation sector with less baggage tags.

Shelf appeal will continue to motivate brands as more and more goods are sold in supermarkets, being one of the few shops that remain open in full lockdown. Growth in Amazon-style shopping will fuel logistic style label needs, and therefore the need for efficiencies in this type of label production will be of prime importance to label converters.

Andy Thomas-Emans, strategic director, L&L and Labelexpo Sustainability, in all its many guises, will be the key theme for 2021. The Covid-19 pandemic demonstrated how vulnerable companies are in terms of staff with key skills, disruption of supply chains and the need to quickly re-orient production, sales and marketing to compensate for lost business.

Sustainability in this wider sense will mean above all the automation of all processes which require key operator skills. Not only increased automation of conventional and digital printing and converting, but also remote sensor networks to monitor machines in real time and remote working systems for design, pre-press and office management functions.

At the same time, the continuing Covid crisis will stoke demands for a more sustainable future, reflected most recently in a number of key label and packaging industry initiatives in liner waste recovery and digital watermarking of plastics. At the converter level this will mean a relentless focus on waste reduction, reduced carbon footprint and zero waste to landfill.

Finally, and perhaps most importantly, we will see an increased focus on building a pipeline of talent to take the pressure off a small number of older and more vulnerable key workers to build a more sustainable future.

“The trending rise of small brands and local manufacturing looks set to continue”

Guido Van der Schueren, board chairman, Hybrid Software

Today more than ever, customers are holding suppliers to a higher standard than before and favoring those perceived as doing the right thing for the industry. It comes to my mind that our industry, like so many others, is at a pivot point. These pivots are an opportunity to reinvent how we work, based on three conditions.

First, align the long-term trend toward remote working with the capabilities of today's enhanced technology. More than 250 customers accepted our offer to install remote software for homework at no charge during the height of the crisis. Second, laterally extend existing capabilities. We were ready. Years of effort in web applications and cloud technology are bearing fruit. We didn't know this in advance, but it shows we are on the right path. Third, pivot toward a sustainable path for profitability both for our customers and for us.

Oliver Kay, director of sales and business development, 3D AG

Consumer demand for smart and connected packaging will continue to grow, as will global trade and e-commerce. Counterfeiting will grow, and thus the need to implement smart anti-counterfeiting brand protection technologies. Budgets to implement such technologies will return. The prices per unit of smart tags (ie serialized QR codes, RFID, NFC, etc) will come down – so we can finally print it and scale it. More blockchain-enabled brand protection and track & trace technologies will be implemented. Converters will enable every package to be 'smart', so brands can 'switch on' on demand – for example, printing a serialized, GTIN Datalink-enabled QR code on every package, whether needed or not. It's all about data: just-in-time data collection, big data, AI-based analytics, business intelligence, predictive forecasting, intelligent 'one-on-one' user engagement.

Jan De Roeck, marketing director, industry relations and strategy, Esko

2021 is going to be an exciting year. Despite what has been a

“Live exhibitions are going to be vital catalysts for economic recovery, and they are needed more than ever”

challenging 2020 with the impact of Covid-19, the label market has remained strong due to demand from the food, beverage, hygiene, pharmaceutical and medical markets in particular. With ongoing market volatility, we believe we will see many label converters seeking to accelerate their digital transformation to bring about enhanced flexibility, agility and efficiency to cope with new demands.

Driving digitization, automation and connectivity across the label production workflow – from incoming artwork to shipping – will be key to competitive success in 2021. As converters seek to respond even more quickly to their customers’ needs, adopting seamless integration of devices, tools and software will drive enhanced speed to market and customer satisfaction.

David Lee, director, Focus Label Machinery

Reducing costs, eliminating risk and engaging consumers becomes more important than ever. Unprecedented, uncertain, unpredictable – whatever word you use to describe the pandemic and the resulting fallout, one thing is clear: the status quo is being challenged in every market and product category.

There is no doubt that many business owners are refocusing and taking a long look at their business model pre and post Covid-19 in terms of productivity, costs, margins and reaching a diverse client base. The recent positive news regarding vaccines provides a light for the future. Low interest rates will provide encouragement for companies to modernize and retire inefficient equipment. The range of digital print and finishing equipment continues to expand and in the present climate makes a solid reason to invest.

Nicola Lombardi, marketing manager, Lombardi Converting Machinery

I believe that after such negative period, there can only be a rebirth. The arrival of tools to defeat the Covid-19 pandemic, along with the new skills we have acquired in our companies to cope with this radical change in the world, can only lead to a restart period. A renaissance. I think that in 2021 we can gradually return to travel and meet again at the trade shows that have always characterized this sector.

The market wants to restart with the free movement of people among continents; real and not just virtual encounters (though virtual will remain as a fundamental part

of communication); and handshakes. I am optimistic about the future of this industry.

Jan Franz Allerkamp, CEO of Actega Metal Print

While it’s virtually impossible to predict anything right now, we are optimistic about 2021. We expect further adoption of the ‘next normal’ with companies finding new ways to conduct business despite the obvious challenges.

With virtually no duty-free purchases and much reduced bar and restaurant trade – we see tier 2 and tier 3 markets starting to boom as consumers buy online from home. A shift in consumer behavior towards purchases of high quality but cheaper products – we expect this to continue at least into H1 next year.

Fulvio Capussotti, executive vice president, self-adhesives, Fedrigoni Group

It is clear in 2020 that all in the supply chain must have full confidence in every aspect of that chain, from the supplier’s production processes, the product, to logistics. The global impact of Covid-19 has resulted in a turnover growth for more obvious sectors such as pharmaceuticals and with the race for a vaccine ongoing, this growth is likely to continue in 2021.

‘Smart working’ is sure to continue for many, even once returning to normality after Covid-19, ensuring online sales will grow. People love the convenience of buying online but without sacrificing quality or safety with packaging, especially for high value goods such as cosmetics, perfume, health and personal care, wines, spirits, craft beers and gourmet foods.

In 2021 we expect further increases in digital printing for small and medium runs that require variable data present. Product traceability and safety is an ever-growing need and the growing shift towards digital printing means we keep on increasing our product ranges for that market.

Melissa Harton, marketing manager, Acucote

Unlike previous years, we believe sustainability is now here to stay. Both from a raw material and organization standpoint – our customers expect solutions. Requests for thinner liners and facestocks will continue to be commonplace, requests for materials made with recycled content will increase, biodegradable and compostable materials will continue to evolve and materials produced from more organic

resources will be sourced. We even have access to plant, vegetable and fruit-based facestocks.

2021 is still very unpredictable but as it emerges, digitally topcoated materials will continue to be ever-growing. We expect nutraceuticals and cannabis labeling to increase even more. And there is still potential growth in prime label for food packaging as Covid-19 moves into the one-year mark. We see continued demand for security/anti-counterfeiting labeling, and increased demand from pharmaceutical products relating to Covid and overall health.

Patrick Graber, label segment manager, Mouvent, Bobst

We will see more demand for digitally printed labels across all digital technologies: inkjet, toner and liquid electro photography. Within these technologies we will witness a new growth chapter for inkjet printing. The market will also witness new label solutions

Mike Fairley, L&L founder and strategic consultant

With no end yet fully in sight for the coronavirus pandemic it seems that the challenges faced by manufacturers and suppliers are likely to continue for much of the coming year. Yes, vaccines may be getting closer to stopping the disease, but the longer term impact on the label industry will certainly have an effect on forthcoming investment decisions, leading to ever more production automation, enhanced data management and information handling and the way employees work – both in the factory and from home.

Having an effective, seamless and automated workflow of jobs will become even more critical in the coming few years. Governments around the world are introducing more environmental measures. Things that label converters may have placed as relatively low category investment are suddenly being forced nearer the top of the agenda. Is the industry ready for what is almost certainly to come? Is somebody in the business tasked with keeping up to speed on such changes and what they mean? The use of solar power, back-up energy generation, electric vehicle charging, drone delivery?

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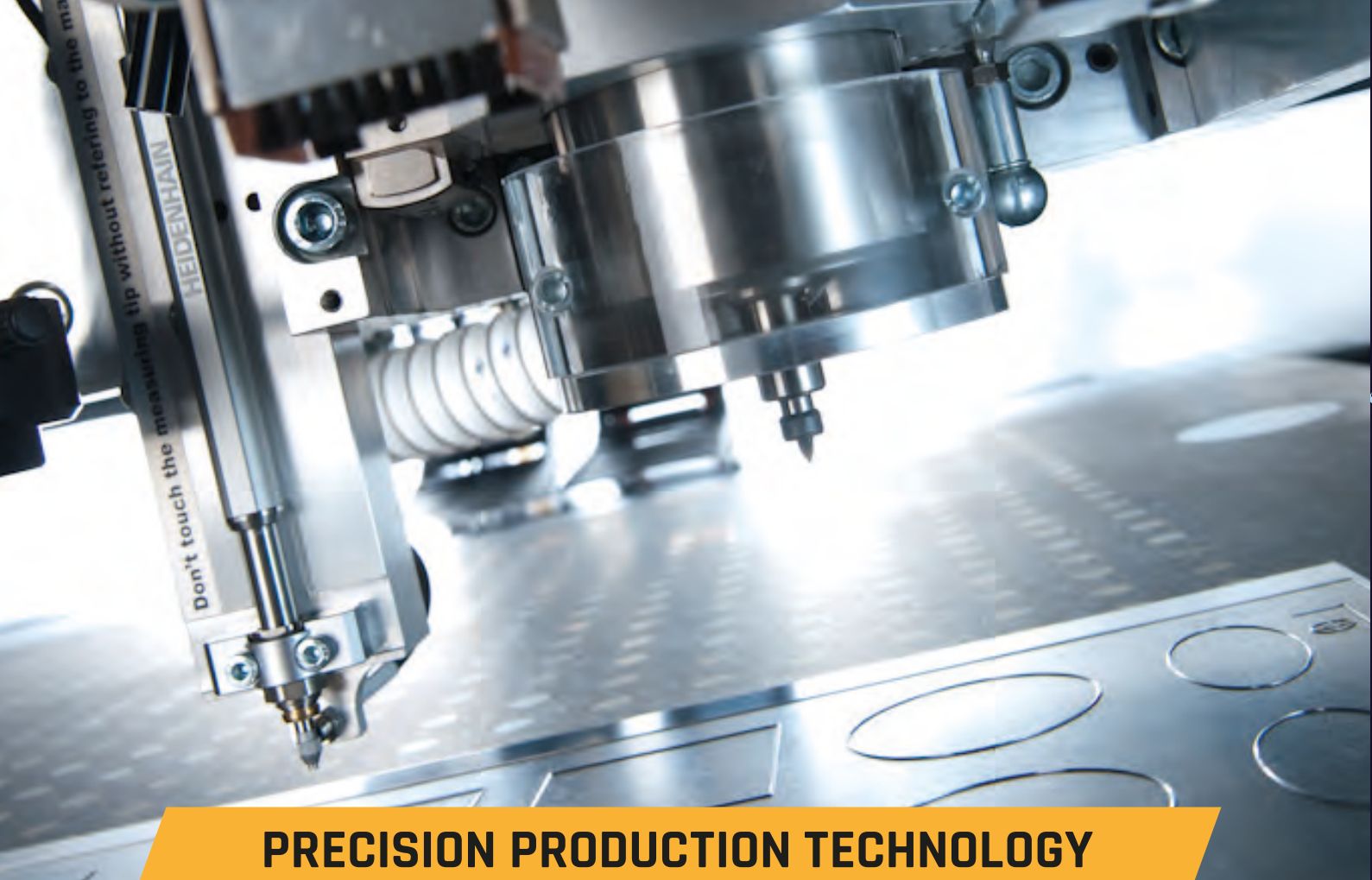
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that integrate priming, printing, embellishment and die-cutting as an all-in-one fully digitalized and in-line process for greater efficiency and faster time to market.

Converters will require more automation and digitalization to stay competitive and depend less on the press operator. Quality control systems and extended color gamut printing replacing traditional ink mixing will help the optimization of production processes leading to an improved cost structure and higher equipment utilization.

“Consumer demand for smart and connected packaging will continue to grow”

Ian Axelsen, business development manager, AA Labels

Increasingly the Amazon and eBay online experience is becoming the expectation and customers want to place orders effortlessly and have them fulfilled quickly. Consumer preference for environmentally sustainable products has waned slightly this year, but this is only temporary and we anticipate that the continued growth of this trend will return in 2021.

The demand for specialist materials and adhesives is also interesting for middle-market converters. Being bold enough to make the investment in stock, and provided the customer proposition is well targeted, can provide access to export markets worldwide. The demand for labels has actually increased as a consequence of the growing use of e-commerce and consumers' environmental concerns about sustainable packaging and the use of single-use plastics. This is reflected in the growth of removable and re-sealable adhesive use and biodegradable label facestocks.

Demand for shorter print runs, driven by cost control improvements in logistics, product specificity and personalization, means manufacturers responsive to this trend are seeing increased growth from additional market share.

Added to the above is the increasing demand for innovation and label embellishment, with really interesting options being created not just in the more traditional production technologies, but the introduction of new finishes and inks.

Dennis Sweet, vice president – NWTL, commercial, Rycoline and distributors at Sun Chemical

Trends and innovations are constantly evolving and we don't see that changing in 2021, despite the pandemic. We're seeing growing interest in shrink sleeves, low migration (especially for food and pharmaceutical), and an industry-wide push to LED-curing at high press speeds. Press speeds are pushing the limits to produce projects quicker than ever before, so we will continue to formulate inks that print at high fidelity at those speeds and meet sustainability objectives.

Stephen Weber, key account director for labels, Innovia

Key trends will be materials with lower environmental impact (lower carbon footprint, films with recycled content films), and materials which allow easier recycling of the primary packaging.

Significant commitments and actions have been made by global brands to reduce their carbon footprint and enable a more circular economy. From this we expect to see more on-pack communication about the environmental positioning of individual products to help consumers make more informed decisions.

As consumers increasingly include product environmental attributes in their spending decisions, brands will focus on more areas that will allow them to differentiate. This trend will accelerate

Lisa Milburn, managing director, Labelexpo Global Series

After the turbulence of 2020, I'm optimistic that we'll experience a global upturn in 2021 as we move into post Covid-19 recovery, borders reopen, international travel becomes possible again, and live trade shows return. Usually, we would have seen a number of major technology launches at Labelexpo shows – particularly Chicago or Brussels, and we know from speaking to our friends in the industry how much our shows have been missed this year.

I have every confidence that our rescheduled Labelexpo Americas, due to take place in June, and Labelexpo Europe in September, will be back in 2021. Live exhibitions are going to be vital catalysts for economic recovery, and they are needed more than ever.

I think we're going to see the fruits of diversity in 2021, as manufacturers and suppliers have adapted to changing consumer habits and demands. Small and medium-sized companies in particular have really flourished, taking advantage of the opportunities for niche products, so it will be interesting to see how these play out with participating exhibitors.

Knowledge will assume greater importance as the industry seeks to equip its employees with the tools it needs to kickstart recovery, so we plan to run more virtual and live events before and during shows, and increase our digital content offering.

This really has been the year of the consumer, so we're going to see embellishment and product decoration – particularly digital and inkjet – among key trends next year. Expect to see these play major roles at our shows in 2021.

the need to include the types of labeling materials used and we expect to see growing demand for facestock films with a low carbon footprint (carbon neutral) and films with post-consumer recycled content.

The brands' aim will be to increase the recyclability of primary packaging – facilitating the inclusion of their product packaging into collection processes and allow them to be sorted into specific recycling streams. This in turn will allow more material to be recovered and reused as recycled content in the production of new filmic substrates.

Ken Moir, VP, NiceLabel

One of the biggest trends is the move to convergence. Companies are increasingly looking for integrated solutions for everything from artwork management to factory labeling and direct marking. Artwork management systems that deal with pre-printed packaging that often has content on it. That content is typically the same content that the label management system uses for factory labeling, so it is likely that the two will integrate over time. More users also want to use one system for traditional thermal printing and for direct marking. This convergence is supported by the ongoing rollout of centralized label management systems that are able to interface with a wide range of devices performing a wide range of different functions.

Label management systems will also integrate with vision management systems as well as product lifecycle management systems, which are typically a rich source of data.

Data services are likely to also see significant growth. The move to online remote labeling is helping generate more data and that will help provide actionable intelligence to many businesses.



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

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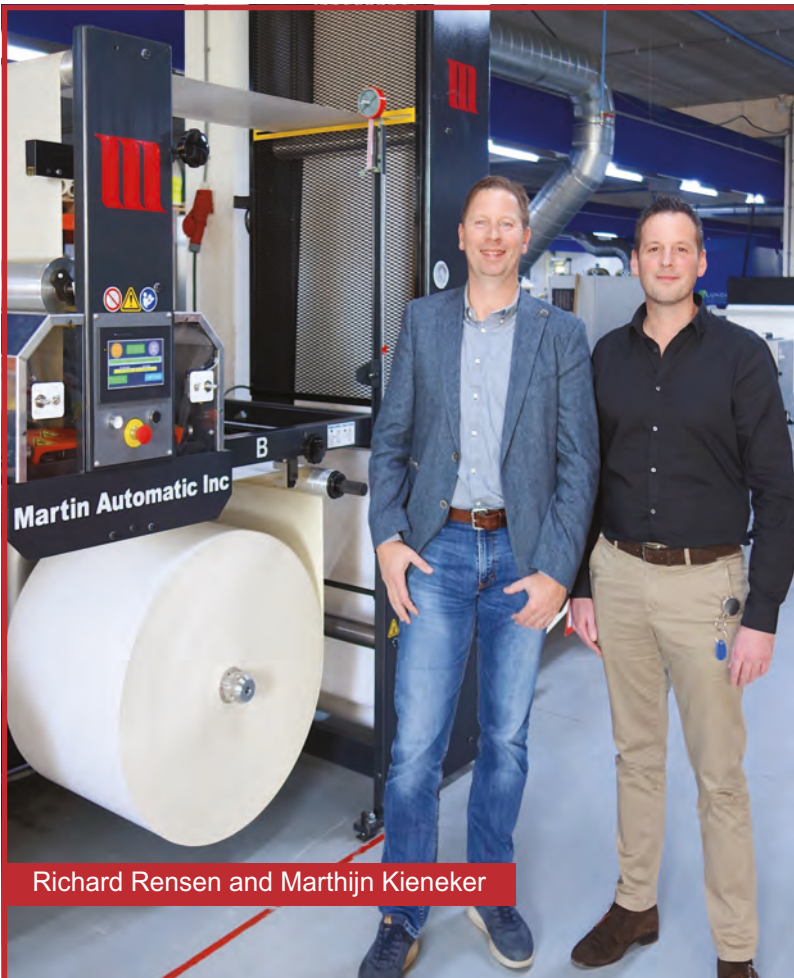


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2020 in review: Europe

The Covid-19 pandemic was the key influence on the European label industry this year, taking down converter growth but increasing demand for label stock. Andy Thomas-Emans reports

The impact of the Covid-19 pandemic on the European label industry is the key reference point for 2020.

We are fortunate to have an excellent and detailed snapshot in the Finat Radar report of the first period of the European lockdown in Q1 2020 – trends that will no doubt be reinforced as the continent enters its latest lockdown as this article was written in Q4.

The survey shows starkly that Q1 2020 converter sales growth plummeted from an average 4.7 percent at the end of 2019 (itself down from 2018 figures) to 3.6 percent.

At the same time label stock growth in Q2 2020 was at the highest point for both papers and films since Radar reports started tracking trends seven years ago. These numbers reflect the surges resulting from the coronavirus pandemic – both consumer stockpiling and label converters amassing materials in an attempt to avoid supply chain disruptions in surging and critical markets.

PS materials have surged particularly in the food, medical, personal care and hygiene sectors, as well as VIP labelstock used in the e-commerce sector. Self-adhesive signage has also grown rapidly under the impact of new social distancing regulations.

More than half of the Finat converter survey group reported that materials delivery times were a major issue during the Q1 lockdown, with companies unable to get the products they needed when they required them. Only 16 percent reported that delivery times remained the same between January and May.

Converters in the UK and Ireland reported the fewest problems with delivery disruptions, possibly driven by shored-up inventories due to Brexit. The highest numbers of converters reporting delivery time delays were in central Europe.

Turning to the employment effects of the pandemic, the report found that only a small number of participating Finat converters had to make employees redundant. More ominously, 38 percent of companies were concerned they would have to do so 'in the near future'. Nearly half of participating converters had not seen any redundancies during the first two quarters of this year and do not foresee having to do so in the near future.

“PS materials have surged particularly in the food, medical, personal care and hygiene sectors, as well as VIP labelstock used in the e-commerce sector”

Looking at pre-Covid growth trends, we see from the Radar report that 2019 delivered slightly lower sales growth for converters compared to 2018 as uncertainty gripped financial markets and the potential effects of Brexit were factored in.

The sales average for all survey participants was 4.7 percent in 2019 compared to 4.9 percent for 2018. Once again eastern Europe delivered the highest converter growth rates – an average of 7.8 percent – while central Europe showed the sharpest decline with 2019 sales growth averaging 2.4 percent compared to 2018.

Profitability

While overall year-on-year profitability rates were up for the participant group as a whole, this was primarily driven by strong profit growth in central and southern Europe. UK and Ireland converters reported robust sales growth at 7.6 percent, but profitability levels were down compared to 2018. Converters in Scandinavia reported the sharpest contraction in year-on-year profitability with an average of -3.8 percent for participating converters in the region.

This could well be reflected in 2020 capital equipment purchasing intentions, which contrast sharply from what converters were projecting in last year's Radar survey. While 25 percent of Finat converter respondents projected they would purchase a conventional or digital press in the 2019 Radar report, that figure falls to 20 percent in this year's report.

Looking at what press types converters plan to buy between 2020-2022, 32 percent indicated they will purchase a conventional press, 32 percent a digital press and 5 percent a hybrid press.

The 'digital' category breaks down into 24 percent for a toner-based press and 8 percent for inkjet. These purchasing indications were pretty much uniform across all European regions.

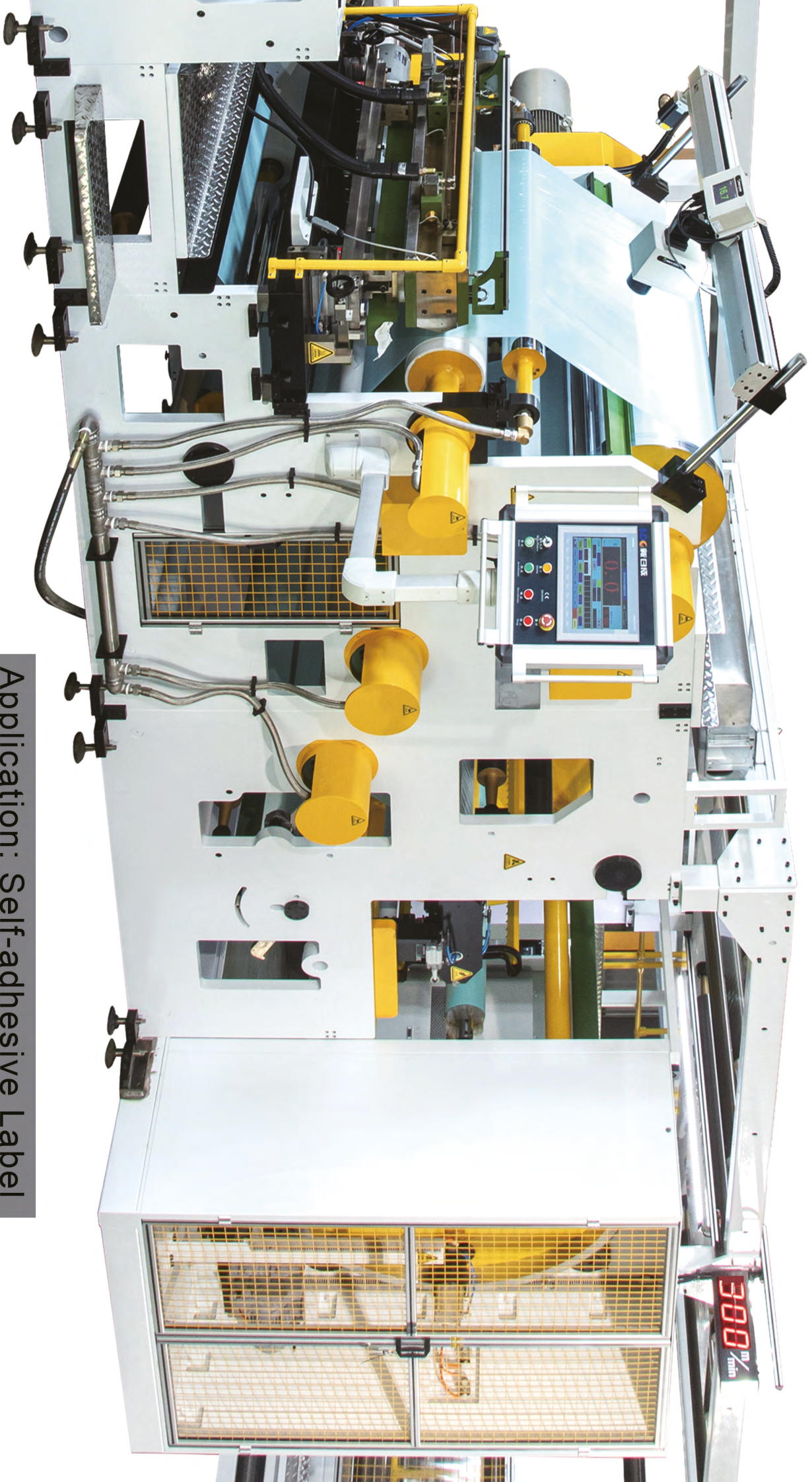
One striking result of the 2020 Radar survey is a collapse in converters showing an interest in diversifying into flexible packaging – very different from last year's survey, which showed pouches as the sector with the highest converter interest. This could well reflect converters refocusing on core PS labels business during the pandemic.

Lineless labels remain one of the top markets label converters are interested in entering, coming in as number one in this year's survey.

As many as 20 percent of survey respondents expressed an interest in entering lineless production, led by converters in the UK and Ireland and central Europe.



Finat members can access the full Radar report at www.finat.com



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2020 in review: North America

Chelsea McDougall reports on market trends, investment forecast and buyer demands from the North American label market

According to market researchers, label converters in North America have experienced such high growth throughout 2020, it's almost as if the label market here is pandemic-proof. Sure, there are challenges, and a lot of the growth depends on a label company's size and the markets it serves, but overall, researchers at LPC had good news to share with the TLMI converter members who participated in a survey it conducted for the association.

Market researchers at LPC surveyed nearly 90 North American label converter companies and found that for the majority of participants, 2020 has been a year of growth. Furthermore, LPC says of those label converting companies who reported growth, 23 percent reported high growth.

Many of the growth spikes, according to LPC, were on two edges of the converter scale range: the smallest and the largest companies had the highest growth averages overall. LPC hypothesized that this could be because those are two company profiles that can often be associated with a nimbleness, the ability to respond quickly to customer demands, and the tendency to be a 'generalist' label printer, meaning those who cater to three or more end use sectors.

“Market researchers at LPC surveyed nearly 90 North American label converter companies and found that for the majority of participants, 2020 has been a year of growth”

This past year was more punishing to converters who specialize, says Jennifer Dochstader, managing director at LPC. 'Focusing your technical prowess in one area can mean higher growth, however it turns out that specializing in certain sectors has had the opposite impact this year.'

From the outset of the Covid-19 pandemic, label converters across North America were deemed essential employers and have remained open throughout, though many are adjusting to a new, cautious workplace and many have sent office staff home to work remotely. Converters in this region have showed great resilience during the pandemic. Many used their expertise in the fight against

Covid-19 to print floor graphics that indicate safe distances, while others engineered face masks for health workers, and it seemed like everyone was printing hand sanitizer labels – some even offering to print these labels for free or at cost.

The first few months of the pandemic were best described by a label converter who said he was conducting business 'as if the house was on fire.' A lot of that chaos was driven by panic buying and hoarding early on, which benefited some industries including household chemicals, transportation and logistics stemming from an e-commerce boom, and of course, food and beverage, particularly for food-at-home products. The pharmaceutical and medical sectors have also witnessed significant growth in 2020.

Many converters have said those markets that saw an uptick in the beginning of the pandemic have since returned to normal levels.

Meanwhile demand in other markets declined. The restaurant business has been hit particularly hard with closures early on and since opening at limited capacity. The automotive industry had nearly a complete shutdown for two months in March, which meant converters who cater to that market had to be ready to respond once they were brought back online. The durables market also witnessed a decline in 2020.

Capital equipment

An interesting trend to watch in 2021 will be where converters in this region focus their capital equipment dollars. At present, it appears converters are spending money to address increased capacity with investments aimed largely at increasing efficiency, productivity and workflow automation.

In LPC's study, the vast majority of respondents said they did not delay major capital equipment expenditures in 2020, and those who did delay, said they will likely make equipment purchases in 2021.

Since Labelexpo Americas, the region's major tradeshow, was postponed from September 2020 to June 2021, it will be interesting to see whether those buying projections hold true.

In a true sign of the times, a number of converters have indicated that their investment dollars will be spent on technology not tied to label production, but has become essential in today's virtual-working environment. Software, high-speed internet, computers – those kinds of infrastructure investments are becoming a priority for many label companies.



For more from the North American trade association for tag, labels and packaging, visit TLMI at www.tlmi.com



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2020 in review: Latin America

Latin America suffered greatly during the pandemic, but the label industry has remained resilient, writes James Quirk

It was a perfect storm. The world's most urbanized region, where 80 percent of people live in cities. The most unequal, too, where a third of people live in poverty, often in sprawling slums not conducive to social distancing. A high number of people who rely on informal, cash-in-hand work, and therefore reluctant to stay at home. Latin America has been devastated by the Covid-19 pandemic. It has seen some of the world's longest and most restrictive lockdowns, but also some of the highest rates of cases and deaths.

According to the IMF, Latin America's GDP will contract by 8.1 percent in 2020. Most countries will not return to pre-pandemic growth levels until 2023; per capita income won't recover until 2025.

The region's label market, though not immune to the crisis, has fared better than many other sectors. 'We saw a big downturn in Q2, but since then there has been a recovery, though the dynamic has varied country by country,' confirms Ronaldo Mello, VP and GM, Label and Graphic Materials, Latin America, at Avery Dennison. 'In Brazil, the government's aggressive stimulus package gave money to more than 60 million people. So here the recovery has been faster. The question is what will happen in 2021 when the stimulus ends. There was a more severe recession in Mexico, but it is also recovering in the third and fourth quarters.'

"This year's major trends are all positive for our market"

'Durables is a good example of a sector which faced a major downturn. But pharma, home care and shipping labels all saw increased demand. Overall, inventories were reduced across the supply chain. But in Q3 and Q4, we are seeing a return to normal levels.'

'Covid stopped all activity for over three months,' reports Nick Vindel, Latin American sales manager at platemounting equipment manufacturer JM Heaford. 'Brazil and Mexico – the biggest markets – have seen a reduction in capital expenditure. I think this is notable not just in plate mounters but also flexo presses. March to July was very quiet, but since August there has been a lot of activity leading to not just an increase in enquiries but also sales. Once the initial fear of the pandemic was overcome, customers realized that labels and flexible packaging were on the increase, with changing consumer habits resulting in a boom for packaged goods.'

Martin Fraire, CEO of Leftech Group, an Argentina-based distributor of graphic arts equipment and consumables, noted a decrease in export sales, 'mainly due to not being able to visit customers'. But business in Argentina remained strong, particularly in the narrow web sector. 'It was a bad year for sheet-fed offset

products, but this was compensated by strong growth in the narrow web label market. The biggest challenge was to maintain supply, due to difficult access to official exchange rates, import restrictions, and longer supply chain lead times.'

In Argentina, label and packaging converters remained open. 'I can't say if it's because of increased demand, or converters stocking up on consumables, or if local companies were trying to stay ahead of the changing exchange rate, but we have sold much, much more than in previous years.'

It was a similar story in Peru, says Jaime Yoshiyama, MD of Lima-based converter Kuresa. 'Companies supplying essential industries received a government permit to operate during lockdown. Our staff had a pass that allowed them to go from home to work at set times. Kuresa did not stop working, although there were days we operated fewer machines or worked fewer hours.'

'Considering Peru had one of the strictest and longest lockdowns, which caused a contraction in our sales from April to June, our sales figures for the year are good. Sales in the last five months have been much higher than in the same months last year, especially in cosmetics and personal care, alcoholic beverages, food and pharma.'

'The main challenge was human resources. Despite continuing production, mobility restrictions made it hard for workers to access the factory. An 8pm to 6am curfew made it hard to run the night shift. There was high absenteeism due to staff being ill or self-isolating. The availability and speed of delivery of self-adhesive materials and inks was a challenge. But even as some customers increased orders to hold higher stock levels, fortunately we had no problems in fulfilling them.'

Optimism

More focus on automation, as well as changing consumer habits, are both positives for the industry. 'The pandemic initially caused problems with human resources, so companies focused on this rather than equipment investment. But this is now changing,' says Vindel. 'Converters are realizing the value that good quality equipment brings. Four years ago, selling our FTS moulder in Brazil would have been unthinkable. Now it has sold into double figures. Automatic mounting, which eliminates operator error and remounts, is on the increase, showing that some companies are not scared by the initial high price, but look at the cost savings that it can bring to their business.'

'I am optimistic that the label market will still grow faster than GDP,' says Mello. 'This year's major trends – more cleaning, more e-commerce, more sustainability – are all positive for our market.'



Read more about Leftech Group in L&L issue 5, 2020, and more about JM Heaford in L&L1, 2021

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2020 in review: China

Covid-19 has defined China's label year, both through lockdown and recovery of the Chinese economy. Yolanda Wang reports

China's label industry in 2020 was defined by Covid-19 – by the way the country was the first to be struck by the pandemic and the first to recover to something like normal life. As such it gives a good indication of how trends elsewhere in the world label industry might work out.

The most encouraging statistic is that China's economic recovery is accelerating. In the first quarter of 2020 when the country was felled by the first outbreak of the Covid-19 pandemic, GDP fell by 6.8 percent year-on-year, then grew by 3.2 percent in the second quarter. In the third quarter 2020 as China fully emerged from the lockdown, the economy grew by 4.9 percent.

This curve was reflected in China's printing equipment exports over this same period. According to the China Customs Service, from January to September China's printing equipment export volume was 1.478bn USD, down 16.6 percent year-on-year. By Q3, however, there were already signs of a strong recovery in some segments, with exports of packaging and printing products rising by 1.2 percent. Similarly, Q3 saw imports of flexo presses – mostly CI flexo machines – rise by 56.8 per cent.

Interestingly, in the narrow web segment Chinese press manufacturers actually saw an increase in business over the whole period of the pandemic, lockdown and recovery. Weigang, for example, saw sales grow by an impressive 12.7 percent from January to September 2020, including both intermittent offset and full rotary in-line flexo presses.

Trends

These trends were confirmed at a series of events organized in China's industrial powerhouse of Guangzhou by the Labelexpo South China 2020 team in conjunction with industry partner and Chinese association PEIAC.

Zhang Yuzhong, executive vice president of the Label Printing Branch of PEIAC and president of Meikei Intelligent Printing Co, said: 'The very fact that the Tarsus Group is choosing to hold Labelexpo South China in Shenzhen is of great significance. Covid-19 has accelerated the transformation and upgrading of industrial structure, business models and business structure.'

Zhang Yuzhong confirmed that the most important direct result of the Covid-19 pandemic on the Chinese label industry has been a concerted drive to increase automation, with the object of both reducing direct operator intervention on the press and to replace – or complement – operator skills by increasing use of machine learning and intelligence.

During the early days of the pandemic lockdown, workers were forced to leave their factory dormitories and return to their family homes in the countryside, leading to critical shortages of skilled press and pre-press technicians. Even after the first lockdown ended, transport networks were so disrupted that it was often

weeks before key workers were able to return to work.

A typical example of the new thinking this situation brought about was from Li Haiyin, general manager of leading commercial and package printing converter Yulong Printing. Like many Chinese converters Yulong was able to substitute lost label work with products such as hand sanitizer and disinfectants, meaning that Yulong Printing's business volume in the first half of 2020 was almost the same as in the same period of 2019.

Nonetheless, the sudden outbreak of the pandemic and its aftermath had a profound impact on Li's thinking. 'I realized that in the future our company must grow towards digitization of production with higher automation and less human intervention.' As a practical response, Yulong Printing has brought forward plans to invest in hybrid press systems combining both digital and conventional technology, as well as investigating digital die-cutting.

“The most important result of the pandemic on the Chinese label industry has been a concerted drive to increase automation”

Labelexpo South China also reflected these changes by introducing a Printing Industry 4.0 zone focusing on automation, machine intelligence and digital transformation, while the Label Printing Branch of PEIAC themed its annual meeting held at the show around 'Smart label, smart printing'. The summit focused on the practical steps converters can take to move towards automated label production and intelligent label print management.

Kevin Liu, event director for Labelexpo South China 2020, confirms these trends: 'Affected by Covid-19 this year, we obviously feel that the process of digitization and intelligent automation of label enterprises has been accelerated. There are two main aspects to this: first, more enterprises have installed digital presses, or are putting digital printing on the agenda. Second, we are finding that medium and large-sized label printing factories in China are paying attention to the construction of intelligent factories, upgrading through the construction of ERP/MIS systems. This was the theme of Labelexpo South China's Printing Industry 4.0 zone, where we fully demonstrated the automatic production process of a label in combination with the concept of the intelligent plant.'



For a review of Labelexpo South China, see *Labels & Labeling* issue 1 2021



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2020 in review: India

With Indian converters importing less equipment during the pandemic, local manufacturers have an opportunity to fill the gap. Aakriti Agarwal reports

Shortly after the lockdown in March 2020, the Indian label industry almost came to a standstill. As time passed and the lockdown began to ease, companies gradually restarted operations and scaled up in a matter of weeks, depending on the markets they were catering.

The Indian label industry reported busy periods in July and August, mainly to flush the dry supply chains in every sector. September reportedly was marginally slow, followed by busy last quarter of the calendar year.

The pandemic has, however, resulted in evolving buying patterns. Alongside brick-and-mortar stores, e-commerce has now caught up with consumers trying to avoid exposure to the virus. Harveer Sahni, chairman, Weldon Celloplast, says: 'E-commerce needs blank labels for barcoding or for printing at the time of dispatch, so the plain label segment could rise exponentially.'

Lakshminarayanan Parthasarthy, business unit head, Signode India Wintek Flexo Prints, says: 'E-commerce transactions have gone up considerably and people are opting for bigger packs. Consumers are looking at opportunities to save any penny they can so companies are, in fact, coming out with offers to get rid of small pack inventory which is slow moving on the shelf.'

Having said this, there is an increase in small flexible pouches of sanitizers that are being distributed at no additional cost at the stores or are delivered with couriered packages. 'Small sachets are in vogue, but they will normalize by the end of the year,' says Parthasarthy.

The lockdown and evolving consumer demand has resulted in fewer press installations and changes in customer requirements.

Abhay Datta, director of UV Graphic Technologies, observes that printers want to invest in reliable equipment with fast set-ups and changeovers. 'A lot of people want to get rid of their old equipment and invest in new narrow and mid web presses to handle pressure-sensitive labels and flexible packaging,' he says.

Jimit Mittal, president, Jetsci Global, Monotech Systems, says: 'Local brands are performing very well and they have a lot of short run jobs. Thus, the sentiment for inkjet is growing in the market.'

Parshav Jain, director, S. Anand Packaging, adds: 'Converters are looking at digital technology equipment, even if that translates to a complete change in a company's marketing strategies or a different team to handle sales from a digital press. It seems to be the need of the hour.'

Manish Kapoor, sales head for the Indian sub-continent at Nilpeter, sums up: 'Capital investment is a result of two primary factors – the first being expansion or capacity enhancement and the second being diversification. A bonus of course is the additional tax benefits from equipment depreciation.'

'People who were expanding have delayed their decision by about a year. For factors like diversification and even tax benefits, Covid has not really changed anything. In fact, diversification got a real push because everyone got the time to think about new business strategies and evaluate market requirements.'

"Challenges with imports and service due to lockdown have resulted in huge demand for high-quality equipment manufactured locally"

In the past few months, Vinsak has installed four Lombardi Synchroline presses at Sreevan Offset in Hyderabad, Aarya Print Pack in Mumbai, Al Hadiqa in Sharjah, and Aquarius Printing in UAE.

Multitec has installed six presses in three months and UV Graphic installed five presses between April and September. Monotech Systems installed the Jetsci Colornova UV inkjet label production press at Maa Gayatri Offset Printer in Haridwar. And Sonapat-based Sai Com Codes invested in a new Konica Minolta press.

Kapoor says: 'Remote diagnostics on presses has become a big trend to enable servicing and trouble shooting at converter's end.'

Opportunity beckons

UV Graphic's Abhay Datta sees potential for growth in the Indian label industry. 'Challenges with imports and after sales service due to lockdown have resulted in a huge demand for high-quality equipment manufactured locally. Businesses are diversifying. A lot of ancillary equipment does not get manufactured in India at the required scale, resulting in huge imports. During lockdown, many companies strategized and are gearing up to manufacture quality ancillary equipment such as slitter rewinders, off-line finishing equipment and other machines related to the label industry in India. Indian manufacturers must prove their mettle in the next few months to benefit from this opportunity.'

Kuldeep Goel, president of Indian association LMAI and managing director of Anygraphics, agrees that the industry is trying to minimize imports. He is, however, not sure if it will benefit the Indian industry because of the price difference. 'If an Indian manufacturer is not cost-effective then we will have no choice. A difference of 2 to 3 percent of cost is bearable but the current difference of 10 to 30 percent in costs and quality is not feasible.'

Amit Ahuja, sales director at Multitec, says: 'Ancillary equipment could get a boost but the Indian industry needs to become more professional and focus on manufacturing high quality products.'

Harveer Sahni concludes: 'It is the industry's responsibility to make better value labels and focus on better design for shelf appeal. The need of the hour is to do more with less to remain relevant in the market.'



Read how Indian converters responded to the Covid-19 lockdown in March at www.labelsandlabeling.com/news/industry-updates/and-down-value-chain

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2020 in review: Southeast Asia

Aakriti Agarwal on the pandemic's impact on the industry in Southeast Asia

As elsewhere in the world, countries in Southeast Asia have been facing severe challenges due to the ongoing pandemic and lockdowns imposed by their respective governments.

A temporary 'half-lockdown' is still underway in Indonesia, according to Henky Wibawa, executive director at the Indonesian Packaging Federation. 'The necessary FMCG retail business is still moving, though certain product sectors are really down,' he says. 'For instance, the ready-to-drink beverages sector is definitely declining tremendously, and this has negatively affected the use of labels for bottles. All in all, the label market is suffering a great deal here.'

Jason Lim, sales manager at Truf, a Malaysia-based equipment manufacturer, says: 'The pandemic hit us badly because we could not travel overseas for machine sales and marketing activities. It also led to cancellation of local as well as international exhibitions in Thailand and Vietnam where we planned to exhibit. Further, training new customers, showcasing presses and servicing equipment are among the major challenges we continue to face. However, we have appointed distributors in a few countries to expand our presence.'

The economy in Thailand – hugely reliant on tourism – has taken a substantial hit due to the ongoing pandemic. Recent street protests by thousands have added to the sense of unease. However, as in many other countries, Thailand continues to see increased demand in sectors such as FMCG, pharmaceutical and food.

“The necessary FMCG retail business is still moving, though certain product sectors are really down”

In the third quarter, the economy in Singapore reportedly contracted by 7 percent. The government has warned that recovery could be slower than expected. According to Euromonitor, the food retail sector in Singapore continues to see growth thanks to demand for premium products and more people cooking at home. While sectors such as tourism and transport, among others, have been affected in Singapore, e-commerce has grown substantially.

'The market, in general, is moving towards e-commerce, parcel networks and fast-delivery supply chain. Following this trend, some converters are rethinking their strategies and looking to invest in flexible and smart equipment, which implies embracing digital printing technology,' says Wibawa.

Jason Lim agrees: 'Some label converters are performing quite well in the local market, especially those catering to FMCG, medical and electronics segments. They are investing in new machines

and expanding their factories. Our company, Truf, focuses on small digital printing presses and inspection systems so we have a good number of enquiries. But the decision-making process remains slow.

'Malaysia has only one technical school that offers printing-related courses. So, there is a continued lack of skilled labor in the market. We are also a price-sensitive market, so printers are very focused on the cost of the machines. Therefore Chinese equipment is expected to continue to maintain dominance with its aggressive pricing and increasingly reliable technology.'

Supply chain

With lockdown grinding economies to a halt in most regions, supply chain management has become of paramount importance. 'People are turning towards local suppliers because of the uncertainty of the lockdown. Purchasing a machine with local support has become essential as companies cannot afford machine downtime without rapid support,' says Lim.

Henky Wibawa elaborates: 'Managing the whole supply chain resiliently is extremely important today. It requires more inclusiveness from all parties involved. There is a need for more sustainable collaboration from raw materials suppliers, packaging converters, brand owners, delivery service providers, retailers, post-consumer waste management companies and other parties. This kind of consortium must be formed locally as much as possible.'

'Labels are crucial to create smart packaging for track-and-trace and authentication purposes. Governments in many countries have already implemented unique label codes – QR or GS1 2D barcode – in the food and pharmaceutical sectors as standard procedure for imperative serialization.'

Label converters across the region have continued to invest during the pandemic, particularly in finishing and ancillary equipment. International suppliers, meanwhile, continue to take the opportunity to strengthen their presence. Univaccon began construction of a new automatic warehouse in Taiwan; Rotocon opened a subsidiary, Rotocon Asia, which will distribute the Ecoline range of finishing equipment in the region; Edale has appointed an agent in Taiwan; Grafotronic opened a new office in Bangkok; Vetaphone, Siegwerk and MPS have all expanded their local teams with new appointments.

'Label printing technology must shift to meet the requirements of environmental sustainability, in line with the trend towards a circular economy, in order to make labels and packaging compatible for economical recycling or easy separation of non-recyclable materials,' says Wibawa.



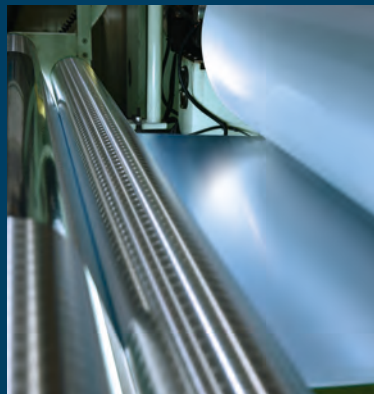
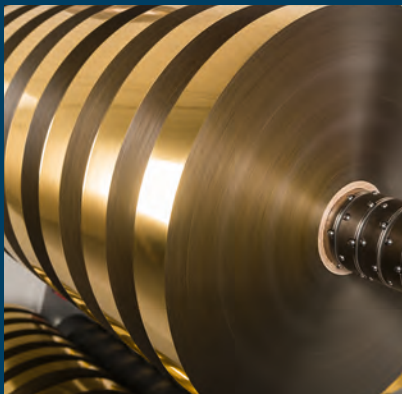
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2020 in review: Africa

Gill Loubser reports on the pandemic's impact on the African label and packaging industry

2020 will go down in the annals of history as the year of the Covid-19 pandemic, when world economies were stagnating under strict lockdown, as some 30 million people worldwide were infected, and more than a million died. But on a more positive note, it has also been a year of heart-warming initiatives as people have overcome challenges; and the African packaging industry can hold its head high in this respect.

Earlier this year, an article published in L&L entitled 'Their finest hour' described the sterling efforts of South Africa's packaging converters to manage demand – particularly for essential food and pharmaceutical packaging – under almost war-like conditions.

But it's not only packaging converters who have had to adapt. Another shining example is the way those heading up the Institute of Packaging SA (IPSA) have risen admirably to the challenge, being exceptionally fleet of foot and innovative to ensure the continuation of packaging education and awards. While IPSA's One-Year Diploma (OYD) kicked off as usual, everything changed overnight with South Africa's stringent lockdown announcement on March 27. Following hurried meetings among academic and secretarial staff, the OYD was rapidly transformed into an online program.

Through the purchase of multiple Zoom licenses, the education team seamlessly switched to an online lecture delivery platform and were pleasantly surprised to find that, with minimal hiccups, it worked well.

Tests and examinations were re-engineered into research-based assignments, reinforcing the need for active and intelligent research. Under trying circumstances, this has been a paradigm shift from the way IPSA's education program has been executed for almost five decades, and the aim is now to catapult the OYD to a global audience, with particular emphasis on other parts of Africa. As Kishan Singh, IPSA's national education officer, remarks: 'Covid-19 has enabled this, and every cloud has a silver lining.'

“It has been a year of heart-warming initiatives as people have overcome challenges”

A similar story surrounds IPSA'S Gold Pack Awards (the local 'Oscars' of the packaging world). The entire procedure for the 2020 program changed, with a traditional three-day gathering of adjudicators exchanged for virtual judging via Zoom.

For this virtual procedure, the judging chairman and three Johannesburg-based judges acted as the eyes, ears and senses of the other judges, scattered around South Africa (one of whom was your correspondent), who appreciated the resultant interactivity as they identified the excellent application of innovative and creative design and technology to South African packaging. Almost concurrently with the publication of this article, in another brave departure from the norm, final results are being announced on a virtual platform.

Just one successful Gold Pack entrant was an enterprise named It's Not Made in China.

As Durban-based entrepreneur Tracy Ruggier watched Chinese imports erode local industry, especially clothing, she bravely decided to establish this business and for her first undertaking she and her husband, William, designed (and patented) a hip flask-shaped PET bottle for still water, on which local artists' works could be displayed. They held competitions for illustrators and used a 'judging panel' to select designs. They now have dozens of illustrators' work printed on their reusable, recyclable PET bottles, which are fast becoming collectibles.

Along their journey, they've experienced supportive collaboration from suppliers, one being the Brodowicz brothers, Devlin and Wade, of Blue Print Labelling in Durban. Then there's the spin-off from the astonishing recycling benefits, as the heavier weight of the clear PET bottles and the use of easily-removable PP labels encourages collection and facilitates recycling.

Africa's economic pulse

While some African governments have acted rapidly to reduce the spread of Covid-19, successful containment measures have come at a high economic cost, as elsewhere in the world. Sadly, in the face of this economic fallout, it's likely that growth in Sub-Saharan Africa will fall to -3 percent in 2020, pushing the region into its first recession in 25 years. According to the latest economic analysis 'Africa's Pulse: Charting the Road to Recovery', the pandemic could also drive around 40 million people into extreme poverty, erasing at least five years' progress in fighting poverty in Africa.

It's estimated that this substantial downturn in economic activity could cost the region at least 115m USD in output losses this year. Per capita GDP is expected to contract by nearly 6.0 percent, in part caused by curtailed domestic consumption and lower investment brought about by containment measures.

Undoubtedly the road to recovery will require massive investment and financial support from the international community, plus reform agendas that include policies to speed up job creation. Several countries, including South Africa, Nigeria and Ethiopia, have begun implementing long-needed reforms in energy and telecommunications spurred by the current crisis, and 25 percent of African firms have accelerated the use of digital technology and increased investments in digital solutions. By mid-September, 46 countries in Sub-Saharan Africa had introduced 166 social protection measures, with social assistance representing 84 percent of these measures.

Although the persistence and spread of the virus remains uncertain, African governments are beginning to institute policies and programs to support an inclusive and sustainable post-pandemic recovery.



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

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2020 in review: MENA

L&L's new Middle East and North Africa editor Akanksha Meena on a turbulent 2020 and green shoots of recovery for 2021

The Middle East and North Africa (MENA) label market was forecast to grow by 3.9 percent in 2020, according to a report by Alexander Watson Associates. But, afflicted by Covid-19, the year ended blemished by economic uncertainty.

The MENA label industry reports that the demand for labels was hampered for a time due to labor, operational and supply chain challenges, exacerbated by the travel bans and lockdowns in other countries. But being essential service providers for the food, personal hygiene and pharma industries, label converters in the region were comparatively less affected than companies in other industries such as tourism.

Sayed Shamsuddin, the owner of UAE-based Al Hadiqa Self Adhesive Manufacturing, estimates a 25 to 30 percent drop in sales of labels in the logistics, cargo and retail industry.

BN Pandey of AL Maha Printers based in Oman noticed a 20 percent decline in demand for BOPP labels and 35 percent for self-adhesive products. Converters suffered from small margins, lack of work, reduced workforce and the spread of the virus. AL Maha's business declined by 10 percent.

Ajay Mehta, MD of SMI Coated Products, says that essential businesses were allowed to operate with necessary precautions. However, expats flocked back to their home countries and caused a shortage of labor.

Overhead costs were a problem. Sudhir Samant, a label industry veteran and consultant, explains that employee shifts were reduced, and salaries and raw material costs were renegotiated.

Converters had to find new suppliers to source raw material due to the differing lockdown norms across countries.

Raja Gandhi, MD and owner of Hexxa Flexible Packaging, faced supply chain disruptions due to the lockdown in India, where the company sources its polyester films. Hexxa turned to new suppliers from China and other countries.

Since most raw material is imported in the Middle East and North Africa, shipments were delayed due to suspended air cargo and logistics and lesser manpower at ports. 'Orders took three times longer to complete,' Pandey reveals.

Pankaj Patel, CEO of Printech ME, highlights that installation and training was a problem due to the travel ban. Potential customers were not ready to conduct business remotely. Road transport within the Gulf Corporation Council states and Middle East had stopped. Sea freight was the only option for exports in states like Saudi Arabia, Bahrain, Kuwait and Qatar, which increased shipping cost.

Signs of recovery

Despite the raging virus that showed no signs of slowing down, economies reopened and businesses heaved a sigh of relief.

Ranesh Bajaj, director of Vinsak, informs that the consumption of labels and flexible packaging for the food sector has now gone up. Some converters are now developing a second production site and strategies for staff to work on alternate days.

"The MENA market is getting closer to Europe in terms of material quality and consumer spending"

Raja Gandhi reports that self-adhesive labels saw a surge in the Middle East due to rising consumption of hand sanitizer in PET bottles and reclosable labels for wet wipes. Hoarding of food materials by consumers was another significant factor for increased label business. 'Our orders multiplied by four times.'

Most of Printech's customers have now adapted to remote machine installation, support and training, reports Pankaj Patel.

The region saw a number of investments during the pandemic. Vinsak installed Lombardi Synchronline 430 presses at Al Hadiqa in Sharjah and Aquarius Printing Press in Dubai. It also signed with the Spanish converting equipment and tooling manufacturer, Tecnocut, to expand the manufacturer's presence in South Asia and MENA. Jordanian converter Label World invested in ICR3 450 slitter rewinder from Lemorau. Raja Gandhi adds that the Dubai market saw at least four or five investments in UV narrow web flexo presses, but the machines are stuck at ports and awaiting installation.

Lecta acquired Avery Dennison's offset sheets business to manufacture Fasson and Jac self-adhesive papers in Europe and MENA. Miraclon signed with Dubai-based Phoenix Technologies to distribute its products in Arab states, including Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the UAE. Dantex named Dubai-based Afra International as its new distributor for the MENA region to expand the group's new digital division.

Bajaj notes that food and e-commerce packaging are growing. Brands are looking at sustainable materials and biodegradable materials are being researched. The MENA market is getting closer to Europe in terms of material quality and consumer spending. There is growth in stand-up pouches, which are replacing PET bottles. However, there is a need for responsible disposal, collection and recycling of plastic materials to establish a circular economy.

Gandhi says that labels for the pharma, healthcare and hygiene product segment saw a multifold increase in demand. Food and personal care labels were buoyant, but the cosmetic sector saw a drop. Sayed believes that technology will evolve to limit human to human contact. Automation will encourage productivity and social distancing.

Printech's Pankaj Patel reports interest from customers in fully automatic registration systems such as Omet's Vision System, Koche + Beck's GapMaster for using flexile dies longer, and open-architecture machines from Prati where customers can add processing capabilities on the machine as their needs evolve.



Akanksha Meena is L&L's new MENA editor. She is also editor of the Brand Print India newsletter



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Industrial labels

Industrial labels are taking on increasingly sophisticated functions as part of agile supply chains, as well as providing a secure source of information in the most hostile of environments. Piotr Wnuk reports

The primary use of an industrial label is to identify equipment and provide visual or textual information regarding use or risks. They can be used to keep track of products across the supply chain where it is not aesthetics but moisture, temperature, or chemical resistance that takes priority.

Most applications for industrial labeling require long-term legibility in often challenging physical environments. They can carry a range of messages including warnings about dangers or compatibility, and the label carrying that messaging needs to last as long as the object to which it is adhered.

'Industrial labeling applications are those that require the use of sturdy labelstock, resilient adhesive, and sometimes special features to ensure the messages they carry will not be lost, or the integrity of the items they protect will not be jeopardized,' says Kim Hensley, marketing manager for roll label products at Mactac. 'These labels rarely exist just to look pretty, and they often carry critical information related to safe usage, compliance or product integrity. In some cases, a durable label might be all that stands between a consumer and disaster, warning of inherent product dangers or showing evidence of tampering or counterfeiting.'

'Industrial labeling often involves surfaces that make adhesion difficult – they may be uneven, covered in powder-coated paints or may just be dirty. In general, you want a durable, chemical-resistant option that will demonstrate not only permanent adhesion, but resistance to environmental factors.'

Yohann Froment, marketing director of thermal transfer specialist Armor, stresses the need for careful matching of label printing technology and consumables, such as label material and ink, to ensure maximum reliability. 'A barcode that can't be read will slow down or even stop a production line,' he says. 'It can potentially result in financial penalties. In thermal transfer technology, there is a large selection of label materials and ink ribbons to adapt to very specific environments, such as solvent resistance, heat resistance, scratch resistance, high-definition print for small barcodes, and high-speed printing, just to list a few.'

Froment also warns about one of the major challenges faced by businesses operating in the industrial labeling sector – multiple end user market-specific regulations.

'In many industries there are regulations or standards that relate to the identification and traceability of products,' adds Froment. 'Industrial labeling is no exception. We must carefully consider each labeling technology in this respect before implementing it. For example, the American standard UL 969 applies to electric and electronic devices labeling: by evaluating the performance of the label material (adhesion capacity and material resistance) and the durability of the printed message (resistances to multiple external stresses), it provides product selection guidelines. British Standard BS5609, on the other hand, has become a reference of print durability for the identification and traceability of chemicals. Here again, we have to consider the right combination of label and ink consumables to comply with it. Finally, car part manufacturers or car brand owners often require each car element (including the labels) to be listed inside the IMDS (International Material Data System) in order to guarantee that each labeling component (label, adhesive, ink) is taken into account for the overall car composition evaluation.'

Changing demand creates challenges

Simon Wood, sales director at UK-based Industrial Labels & Nameplates, has been active in the label and metal nameplate



Moisture, temperature or chemical resistance takes priority in industrial labeling

“These labels rarely exist just to look pretty, and they often carry critical information related to safe usage, compliance or product integrity”

industry for over 40 years, during which time he has seen dramatic changes brought about by emerging technologies and changing regulatory requirements.

'In my early days the requirements were generally for anodized aluminum, black on silver with square corners and four holes. All colors in those days were printed one pass at a time.'

Wood says his customers now include in their specifications a multitude of additional factors such as color, shape, adhesives that work in a variety of conditions, barcodes, sequential numbering and all sorts of special processes to enhance the look of the labels. 'The aesthetic of the label in 2020 is just as important as the robustness and durability of the product,' he adds. 'As technology moves on, it's also quite hard to keep pace with all the new innovations that crop up.'

'For industrial labels as a product, we have noticed a growing interest in intelligent, smart labels and in sustainable label materials,' says Brett Wilms, managing director of identification solutions for EMEA at Brady Corporation. 'In the future, all products, both in the retail and in the industrial product market segments will need a unique digital identity to enhance their visibility throughout the supply chain, all the way to the consumer. This enhanced visibility will help improve efficiency, increase sustainability, and enhance the customer experience.'

One of the biggest challenges currently is the uncertainty about a further slowdown of the economy due to changes in the global political and social climate. The label producers that thrive will be the ones who are best able to adapt.

'This uncertainty will also create a path for opportunity and change, and it is not only relevant for the industrial label market. We can expect agility to replace pure performance and cost as the new norm,' adds Wilms. 'As many label converters have been facing reduced order sizes and increased pricing pressure, most of the efforts in the past years were related to improving label manufacturing performance. Interesting new technologies such as digital and hybrid printing were being discovered and implemented, and new label materials have been introduced, so this is just the start of a new era.'

Tim Pattison, UK sales and operations director at Interket, confirms that key trends are the adoption and integration of digital print alongside flexo alongside reduction in run lengths and increased SKUs. 'That said, 2020 has seen a reverse in this trend, with supermarket chains and large brand owners standardizing and reducing designs to meet consumer demand during the pandemic. I believe the ability to offer flexibility will be the key challenge for industrial labeling going forward.'

On the other hand, Carsten Otte, director of business segments and tailored specials at UPM Raflatac thinks that the market is relatively 'fixed' in the sense that the industry is somewhat conservative, and even a bit change-resistant, meaning transformation is quite slow. 'The reason for the industry remaining steady is that the requirements are high – printability, chemical and mechanical resistance, and regulations need to be followed and changes typically require re-qualification, which means cost, effort and risk,' says Otte.

Trends shaping the market

The unprecedented spread of the Covid-19 pandemic around the world has impacted every human being in some way. It also became a hot topic for businesses specializing in industrial labels, which quickly responded to new market needs.

'There are a number of opportunities in the market, especially with those customers that take their labeling seriously,' says Simon Wood. 'If equipment during these Covid-19 times is really being cleaned down on a regular basis with alcohol-based cleaning agents, then the labels should be sturdy enough to withstand the required conditions.'

Adds Paul Purdef, marketing director of durables, label and graphic materials at Avery Dennison in North America, 'The need to track the use of N95 masks and other PPE will be critical and the systems used today at hospitals and other industries need significant enhancements. I can see traditional track and trace label solutions along with smart technology such as RFID being part of the solution going forward.'

Now more than ever, the hospitality industry is enhancing safety measures for consumers. Across the globe, hotels are introducing new standards of cleanliness and disinfection to ensure guests enjoy a clean, safe stay.

'Mactac's hotel security seals are a cost-effective, basic means of improving hotel security – giving consumers peace-of-mind that their health and safety is a top priority,' says the company's Tim Hensley. 'Our security seals feature a unique, non-residue removable acrylic adhesive. When the label is removed, a concealed "Void" image becomes visible on the facestock, yet no adhesive residue is left on the application surface. As guidelines and mandates for the phased reopening of businesses and establishments like hotels, restaurants, bars, theme parks and more begins, the trend to provide added consumer reassurance with security seals is certain to grow.'

Along with reaction to Covid-19 developments, several other key trends can be expected to shape the industrial labeling sector of the future, such as print-on-demand, sustainability and implementation of interactive technologies.

'Print and apply labeling systems is a fast-growing segment, responding to industrial labeling challenges in terms of integration with automated and high-speed assembly lines or conveyors,' says Yohann Froment. 'This evolution is linked to the progressive implementation of Industry 4.0 processes, which is bringing about more reliable and automated labeling systems.'

'Print-on-demand in chemical labeling is growing in response to the demand of smaller lots and greater flexibility,' confirms Otte. 'This growth is in part due to the implementation of GHS in chemical labels, but also other digital technologies like UV inkjet are gaining market share in industrial and durable labels.'



The American standard UL 969 applies to electric and electronic devices labeling

“Research and Markets projects the industrial label sector to reach USD 69.1 billion by 2027, growing at a CAGR of 5.1 percent”

According to Pattison, one of the big trends is the use of label technologies for track and trace, particularly for high value items in the supply chain. 'We have developed a solution offering manufacturers and their supply chain up to 14 layers of security using a combination of repro, ink and print techniques to protect brands from fraud and offer tamper resistance, all within the label design. We are seeing this approach being used not only for the obvious applications for parts and assembly but also for high value food and healthcare product labeling. We see a clear opportunity to take this solution into new sectors for our business, which can be delivered to our international markets as a group offer.'

Will the industrial label go green?

'On a general level, sustainability is a growing trend that shows no signs of curtailment,' says Otte. 'We are already seeing inquiries for sustainable products, like our UPM Raflatac Forest Film, for chemical or oil can labeling. The technical properties of this product, or products with post-consumer recycled content (PCR), are the same as conventional materials and allow brand owners to get closer to achieving their sustainable packaging targets. In the United States, we are seeing a trend where vinyl labels are being replaced with more sustainable materials like PET or polyolefins. There is still a lot of vinyl being used on drum labels, but slowly but surely that is changing.'

Otte says there are an increasing number of industrial end users looking at improving their environmental footprint via recycling services, and demand will only continue to increase.

'Sustainability is increasingly more important for the segment,' echoes Avery Dennison's Purdef. 'It hasn't been a huge point for the label material per se, but the segment as a whole is seeing pressure. One key area of sustainability that is impacting label choice is the trend to use more sustainable plastics, paints and varnishes. These surfaces are what the label material has to bond to and still deliver performance as expected. Additionally, in BS5609 certified chemical drum labels, the push to eliminate vinyl has intensified. Especially when chemical drums are shipped to Europe. It was a key reason we launched our new Laser Drum PET just over two years ago.'

Brady Corporation's Wilms also sees sustainability as a factor of growing importance. 'Sustainability is a continuously accelerating topic and I think all label companies will have to continue their sustainability efforts. Companies will have to come up with innovations that advance the circular economy by reducing



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Industrial labels often provide critical information



British Standard BSS609 has become a reference of print durability for the identification and traceability of chemicals

their environmental impact through their operations and supply chain, all while staying profitable. Hopefully a consolidation and standardization of sustainability efforts will happen within the label industry, because at the moment everybody is doing something without leveraging the impact an aligned industry could have.'

Suppliers have focused hard on new processes and initiatives to improve the eco-friendliness of their industrial labeling materials, including glassine recycling and thermal transfer ribbon waste recovery.

'Our most recent product – APR1 – uses 12 percent less plastic than standard thermal transfer ribbons,' says Armor's Froment. 'In France, our ribbon collection and recovery program – RecPet – has been running successfully for several years, therefore we are now expanding it in North America and soon in Asia.'

The converter's side of the market similarly lists sustainability as a high-priority business target. 'As we coat our own label substrates, we are in a great position to develop new substrate combinations in partnership with our customers and are fortunate to have a detailed understanding of the plastics recycling process within the business,' says Interket's Pattison. 'We hold a range of certifications including Zero Waste To Landfill (Labels), Zero Waste To Landfill (Foil), PEFC (Promoting Sustainable Forest Management), FSC (Forest Stewardship Council), Sedex, and are RSQS Registered. We believe if as an industry we continue to work together and use our technical knowledge collectively we will undoubtedly support the brands and retailers in reaching their environmental objectives, some of which are extremely ambitious.'

The future of industrial labeling

According to the latest report published by Research and Markets, the global market for industrial labels is estimated at USD 48.8 billion in 2020. The company projects this label segment to reach USD 69.1 billion by 2027, growing at a CAGR of 5.1 percent. The demand for industrial labels is on the rise.

'With new printing technology, and some of the industrial business coming back to the US, there is some light at the end of the tunnel,' says Purdef. 'The companies that can offer technical and lab testing support, along with first-to-market innovative products, will be in good shape to earn more in this space.'

Wood sketches an equally positive outlook. 'The industrial label and nameplate sector will continue to change and those companies that can provide the expertise and those that can adapt to and find the developing markets will always thrive.'

'I believe the trend for the next few years in labels and labeling will be a continuation of what has been started in the last seven years,' adds Wilms. 'We will see consolidation of label manufacturers, through mergers and acquisitions, where bigger, global companies will absorb smaller label converters that have been impacted economically by the Covid-19 situation; however, those bigger companies will still be faced with increased demand for better responsiveness to customers. Agility will become more important than pure performance and added value and profitability

will be made by those companies that are flexible, innovative and capable of using the new technologies and new label materials in the most creative ways.'

Interket predicts industrial labels will be increasingly used by big brands and retailers to engage with their audience. 'We will see more focus on digital manufacturing where front-end and back-end form a closed loop through workflow automation in which digital or hybrid printing will lead to faster job changeovers, enhanced efficiency, reduced downtime, less ink and less substrate wastage,' predicts Pattison. 'We will also see enhanced label capabilities with more personalization, including custom variable data, embedded augmented reality and sensors, RFID, NFC and other smart communication solutions.'

According to Otte, sustainability is the name of the game. As with most any other segment, demand for more sustainable label materials will increase with each passing year. 'UPM Raflatac has a healthy portfolio of sustainable products, including those that contain recycled content, bio-based materials, and those that enhance recyclability, all helping brand owners enable a circular economy. Every company has its own (often very different) sustainability targets, which can vary widely between different brand owners, and these targets will feed the demand for more sustainable solutions.'

'The volatile, complex and uncertain new world creates many exciting opportunities that will push label manufacturers to work more closely with brand owners, their industrial customers, end users and their material and equipment partners,' says Wilms. 'Only joint efforts will make the label industry even more important in this new world.'

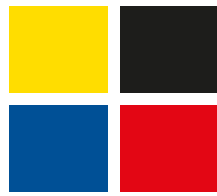
According to Wilms, label manufacturing will continue to innovate to keep up with new demands driven by label end users. Press technology and software advances will bring new levels of automation to plate, cylinder and flexible die changes, in-line color measurement, slitter and knife set-up, press management, and web inspection. Even printed electronics and nano-printing technologies will be fully industrialized for commercial use.

'All these developments combined in the latest generations of hybrid analog/digital label printing presses will lead to the creation of the most sophisticated in-line and automated multi-process label manufacturing. When all of this is linked with advanced ERP and MIS business software, artificial intelligence (AI), cloud computing and fast-evolving Internet-of-Things (IOT) possibilities, it will create a new and exciting era for the labels manufacturing industry,' concludes Wilms.



For more stats on the industrial label market, turn to the Label trends page at the back of this magazine

Images courtesy of Avery Dennison and UPM Raflatac



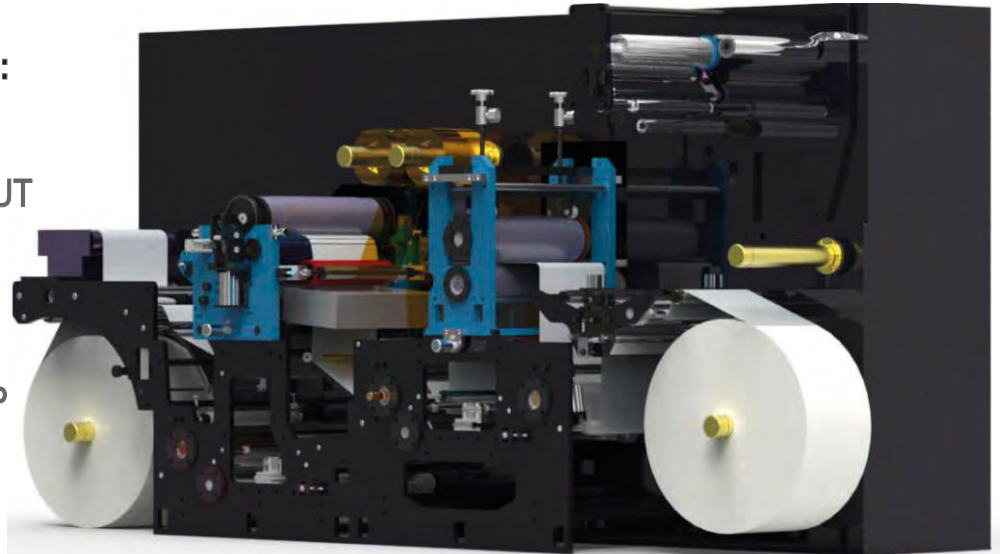
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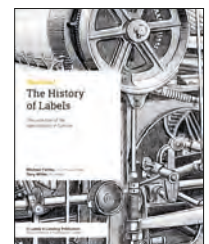
Despite the recent advances in digital printing, the great bulk of self-adhesive labels are still printed by conventional printing processes, namely flexography, letterpress and offset.

Conventional Label Printing Processes explains the fundamentals behind each process, how they fit within the industry, and how they are changing. It is an essential read for label converters, end-users and the wider label printing industry.

The chapters in this book will specifically look at:

- + The changing landscape of label printing
- + The letterpress printing process
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Managing a self-adhesive materials inventory

In an exclusive extract from the new Label Academy book 'Self-adhesive materials', Andy Thomas-Emans looks at all aspects of managing a self-adhesive roll inventory

Setting up an automated stock management system has become particularly critical as label printers are increasingly asked by brand owners to provide traceability of all self-adhesive materials for every batch. Meanwhile, inefficient stock management is now recognized as one of the leading causes of waste and incorrect estimating.

This article examines all the aspects of managing a self-adhesive roll inventory: minimizing the complexities of the ordering process; automated stock control; more effective estimating; and minimizing waste by setting up a detailed shop floor reporting system.

Catalogue and specifications

Each of the three individual components of a self-adhesive laminate – face material, release liner and adhesive – have their own characteristics, and suppliers offer the converter many combinations of these three elements in their product catalogs.

The face material (frontal) is the layer that will be applied on the final product. During this application the release liner (backing) will be removed and the adhesive (glue) will make the face material stick to the product surface.

The specifications for the face material are obviously related to the appearance and the shelf-conditions of the final product. A label on a wine bottle is often a coated paper, sometimes with an extra finishing like embossing or a soft touch varnish. An oil-can label will require a very resistant material like PE (polyethylene). Sometimes extra variable data will be printed on the label during the application process. The adhesive will have to meet the customer requirements for storage conditions (eg deep freeze) or end user treatments (removable, permanent).

The liner is often chosen in relation to the adhesive and the application process used, either manual, semi-manual or fully automated.

Many more combinations and material characteristics can be found in the product selectors of the different suppliers. Every supplier offers a catalog of set combinations of the three components to avoid an endless list of individual products, while some suppliers allow converters to order almost any combination. The product selector guides the user to the most suitable material for the finished product and its end use conditions. We will use the word 'substrate' here to define a specific combination from one supplier.

The selection process requires specific technical knowledge and because the printer is the one who mostly buys the self-adhesive material, they will need to provide this knowledge. The very first dialogue between the printer, the brand owner and the applicator for a new product series is often about the conditions in which the product will be labeled and the usage of the label. This will define the selection criteria.

Because different suppliers do not offer perfectly equal components, it is not easy to create a set of equivalent substrates from different suppliers that can be exchanged in all cases. For this reason, the brand customer's product specialists will sometimes require one specific substrate from one supplier to be used, or will only allow for one or more specific alternative substrates.

It is advisable for suppliers to provide a set of characteristics in

SELF-ADHESIVE LABEL

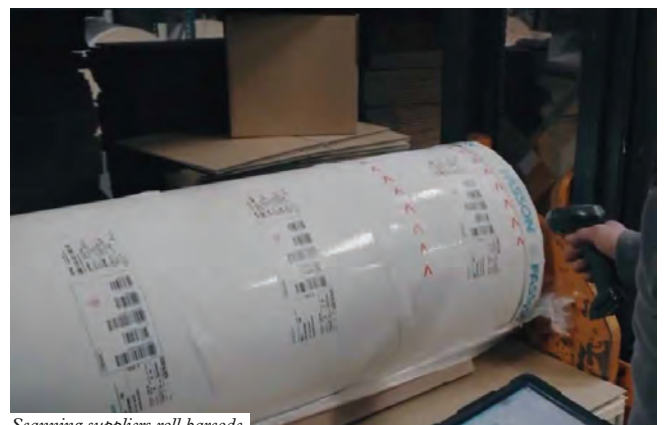


Composition of self-adhesive roll (courtesy UPM Raflatac)



Label applicator machine (courtesy Packsys)

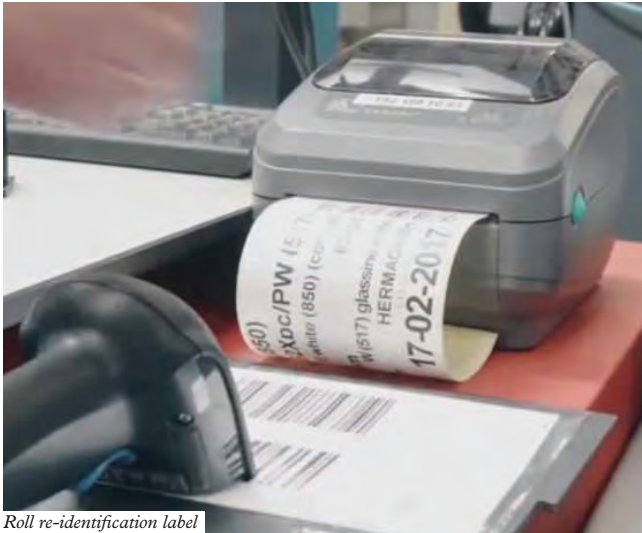
“Inefficient stock management is now recognized as one of the leading causes of waste and incorrect estimating”



Scanning suppliers roll barcode



Epsma roll identification label



Roll re-identification label

“Every complaint about an individual roll, whether before or after production, can be traced in the supplier’s production database by sending them the roll ID”

their catalogs that will allow converters to find equivalents for each individual component – for example all permanent adhesives or all PE face materials.

Only when all three components match would alternative substrate choices become available.

In some cases, it can be useful for converters to send substrate specification sheets, as provided by the self-adhesive material supplier, to the customer as soon as possible. One can argue that this will restrict options later, but storing the chosen supplier’s substrate identification code in the customer’s product specifications will avoid trouble later, since more recently produced labels could end up on the shelf next to labels produced earlier. The more sensitive this issue, the less likely are customers to allow for alternatives.

Ordering and delivery

By always ordering the same substrate for every re-run job, the converter will not make a mistake. Luckily, the substrate identification codes for self-adhesive materials are independent of the ordered length and size. Using a 180mm-wide roll on a very narrow press or a 330mm wide roll on a wider press does not require a change in the substrate’s identification code. Of course, the width and length must be provided upon ordering.

By using a price per sqm, self-adhesive material suppliers allow printers to use one purchase price for one substrate, independent of the width. This leads to the first two levels of a self-adhesive material catalog: substrate (a specific combination of the three

components, independent of width) and material (a specific width of a substrate). At the substrate level, only sqm is relevant; for the material level, the width and length are added.

But this does not mean that ordering is easy. Price tables are related to the quantity ordered and supplementary restrictions can limit the options for ordering. Sometimes a minimum quantity needs to be ordered and, in some cases, it is necessary to order a predefined length, like 2,000m, or width, say 1,000mm. The purchaser must indicate how this width, far too large for production, will need to be slit by the supplier (for example $1,000\text{mm} = 3 \times 330\text{mm} + 10\text{mm}$) and they will need to pay for the complete sqm ordered, even though the supplier can be asked to destroy the left-over width.

This means that in the order process, the user should be able to combine individual material orders into a cut-instruction for the supplier, all for the one substrate-ID.

Almost every self-adhesive material supplier now offers electronic ordering systems, but the more complex the set of limitations, the larger the number of system rejections.

The benefits of electronic ordering are great for both sides. The supplier will not have to retype instructions and can have software handle most orders automatically. The customer will receive an almost immediate order confirmation for delivery quantity, date and price and can schedule accordingly.

When the truck leaves the supplier’s production site, the customer will receive an electronic ASN (advanced shipping note or manifest) with the details of all rolls that are on the truck.

This will allow for a very easy reception procedure at the printer. The packing slip of the truck driver needs to be checked with the goods unloaded from the truck and with the details of the ASN.

No re-identification is necessary, since the supplier’s identification labels on every individual roll will match the roll IDs in the computer’s stock database after processing the original ASN data. The only thing to do is to move the rolls – or pallets with rolls – to the appropriate stock location.

Since the stock locations are identified with a barcode, the operator only needs to scan the supplier’s barcode and the barcode of the stock location.

Traceability and inventory

Using the supplier’s roll identification for each individual roll is the third level of an adequate self-adhesive material inventory, next to substrate and material (width).

Every complaint about an individual roll, whether it is before or after production, can easily be traced in the supplier’s production database by sending them the original roll ID.

At the same time, a system with perfect in-house traceability of all rolls in stock can be set up. Every roll can be at ‘any’ location in the warehouse or on the shop floor. No need to book the consumption of a roll when leaving the warehouse and booking it back in on return. The warehouse is everywhere, and all rolls are in stock until all the meters of a roll are consumed. The only thing to do is to scan roll ID and stock location ID upon each roll-stock location change.

Rolls can be placed into racks at any height and you do not need to put all rolls from the same substrate together in one area, so less floor space is required. There is no need to use special stock locations for quarantine. A roll can be quarantined by a special scan function and the software will prevent this roll from being used again until it is de-quarantined.

Counting stock is nothing more than scanning all individual rolls. Instead of doing this once a year, this can be organized in groups of stock locations. When stock managers have some spare time, they can check one or more stock locations by scanning the rolls in it. The result of these scans will be compared with the information in the rolls database and errors can be corrected immediately. The



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“According to figures from Cerm, in extreme cases only half the total material ordered by the converter ends up actually going to the customer as finished labels”



A non-stop unwinding system

disciplined scanning and regular counting of rolls is the foundation of a fully reliable inventory.

Based on this precise data, only the substrates required for the current and next day's production need to be ordered. The only thing to do is estimate exactly what will be needed. This means a solid comparison between a plant's theoretical and actual consumption must be set up. Fortunately, the organization of a detailed roll consumption system will, at the same time, deliver all data needed for this kind of detailed traceability.

The warehouse team will put all rolls necessary for the next few hours' production close to every press. They will, of course, not forget to scan this new stock location, and they will always take the oldest rolls first. The press operators then scan the barcode of the new roll upon every roll change on the press. An automatic counter registers the meters consumed until the roll is switched again. When a roll is not completely consumed, the remaining meters in stock will be the new stock quantity for this individual roll, and a new identification label with the same roll ID and these remaining meters will be printed. The operator will stick this on the roll for precise re-identification.

As well as booking roll changes, the press operator also books each job change on the press. The combination of these two will give a detailed description of material consumption on every job. This information is then compared with the estimated material consumption. At the same time this system provides a detailed list of all paper roll IDs used for this production job.

The linear meter counter can be a third-party device mounted on the press, but can also be delivered by the computer driving the press.

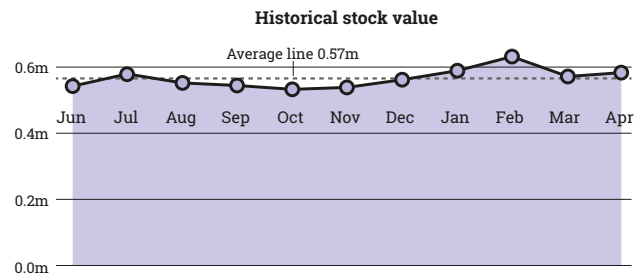
Roll changes can be booked manually by the press operator, but today's automatic unwinders can deliver this information electronically. The operator will scan every roll loaded onto the unwinder, which sends the new roll ID and the exact timestamp to the MIS system which process the data.

Job changes can of course be booked manually by the press operator, but today more and more presses can deliver this information to the MIS, even if only feeding back job start and end.

All of this gives the converter a precise inventory. The operations team can see which rolls have almost reached their expiration date,

RAW MATERIAL INVENTORY

What is the value of the material warehouse?



based upon the validity date on the original ASN, and can see which alternatives are still in stock.

This does not mean that there is no place for human stock-keeping intelligence. You can limit the widths you buy to avoid roll-width switches when consuming left-overs, for example. Or you can guide customers to order larger quantities where there is a high minimum order quantity to avoid leftovers for less used substrates.

Estimating and reporting

The ultimate key to reducing inventory is precise estimating of substrate quantities needed for production. This will start by breaking down current waste totals in the finest possible detail. According to figures compiled by MIS specialist Cerm, in the most extreme cases only half the total material ordered by the converter ends up actually going to the customer as finished labels.

Waste estimation techniques include setting up an average waste per roll and multiplying the number of roll changes required for a given production length. This can be determined by checking how many meters are thrown away at the end of every roll; how many meters are not used at the beginning of every roll; and how many meters are lost when switching rolls. You can even use two bins to collect this data, one at both ends of the press.

Detailed waste reduction instructions, based on these estimates, should be followed by the press operators. As a practical example: suppose you have to run five different products of the same series – same paper, size, shape – on one job on one roll. The printing waste is at the 'end' of the roll that enters the first finishing device. But it can be reused for the set-up of the next roll. So the start of the first product and the end of the last product will get the largest production waste quantity. There is no need to waste the same quantity of material for the products in the middle of the roll.

A good shop floor reporting system can help determine the biggest components of your waste. If you measure the length entering every individual machine for one job, you will know how many meters are lost during the different production steps like printing or finishing.

The same reporting system can give you much more useful information. You will be able to set up an OTIF (on time in full) delivery rating for your material suppliers. You will know exactly the total sqm purchased per type of substrate for your annual price negotiations.



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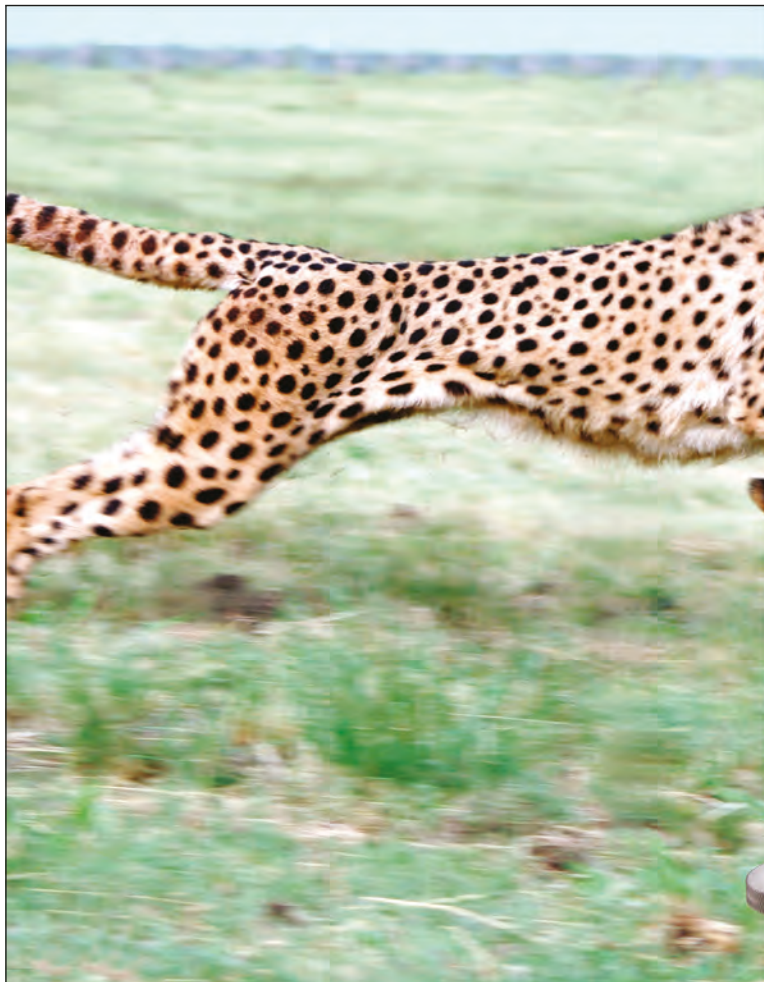
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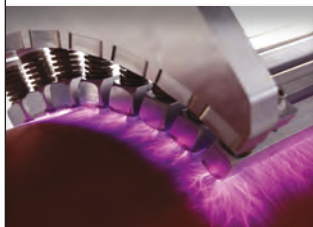
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Label trends

Global projections for the industrial label market



Worldwide industrial label market trends

- Projected to reach **USD 69.1 billion** by 2027
- Currently estimated at **USD 48.8 billion** in 2020
- Compound annual growth rate (CAGR) projected to be **5.1 percent** for 2020-2027
- Polymer expected to reach **4.6 percent CAGR** and **USD 39.4 billion** by 2027
- Metal is anticipated to reach **5.7 percent CAGR** by 2027

Industrial market differences in US vs China

US
Estimated at
USD 14.4 billion
in 2020

China
Projected CAGR of
4.9%
from 2020-2027

China
Anticipated to reach
USD 12.3 billion
by 2027

Other countries to watch

Japan
anticipated to grow at
4.7%
from 2020-2027

Canada
forecasted to grow at
4.3%
from 2020-2027

Germany
expected to grow at
4.8%
from 2020-2027

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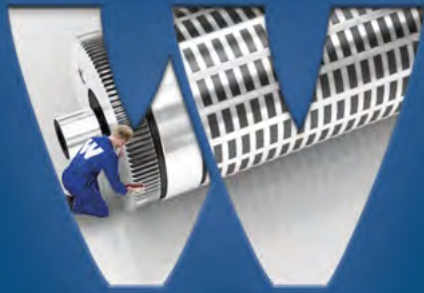
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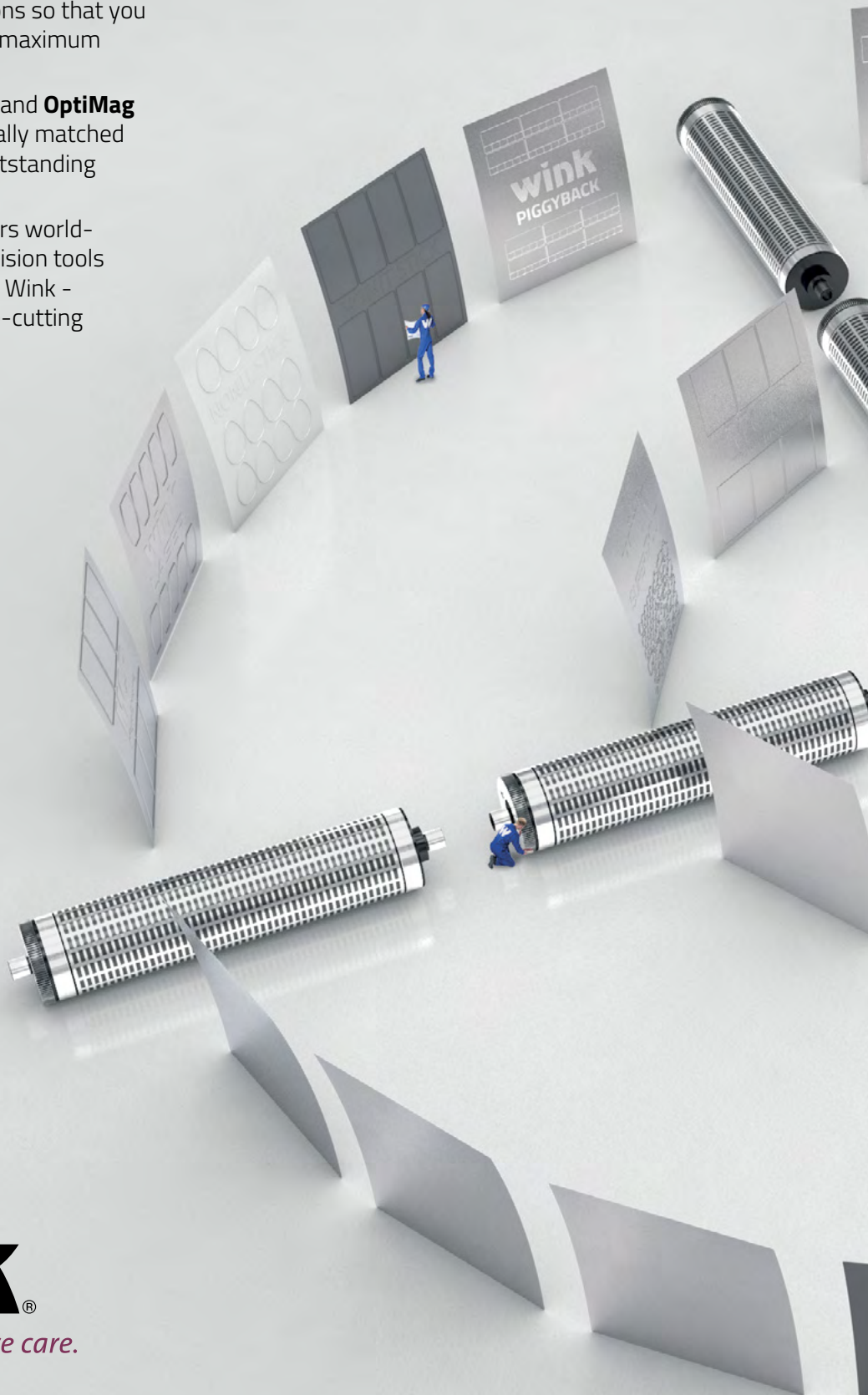
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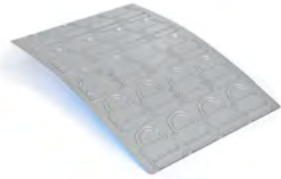
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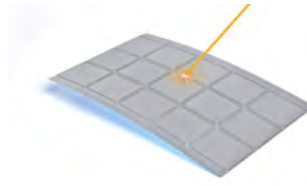
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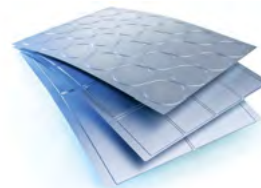
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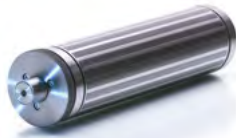
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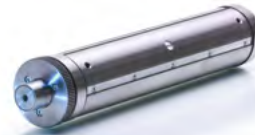
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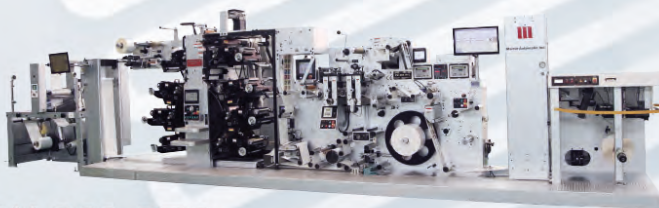


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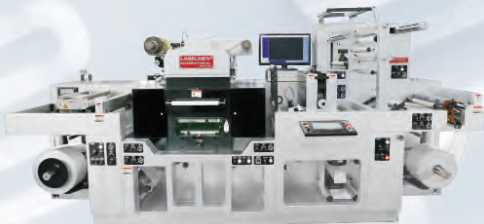
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