

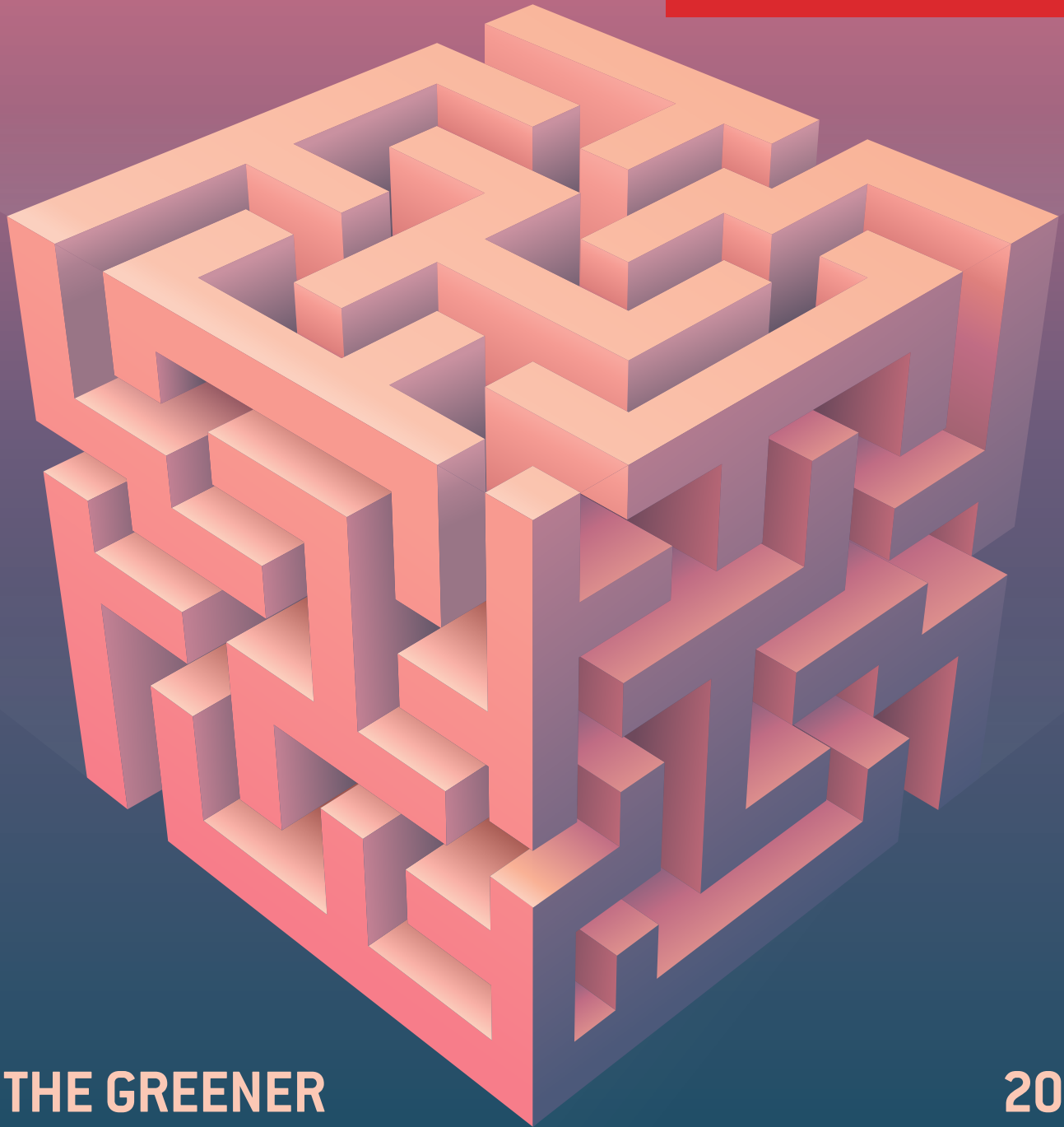
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VOLUME 43 | ISSUE # 4 | OCT - DEC 2021

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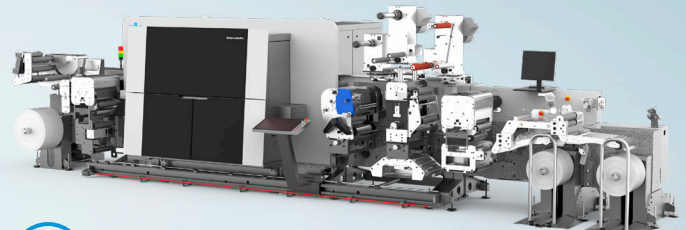
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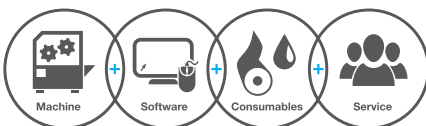
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DM-UNILINER 2D (flat metallization)
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L&L

– Meet the team

Labels & Labeling is the leading global information source for the label and package print converting industries with an editorial team and network of correspondents spread throughout the world



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Contents



37



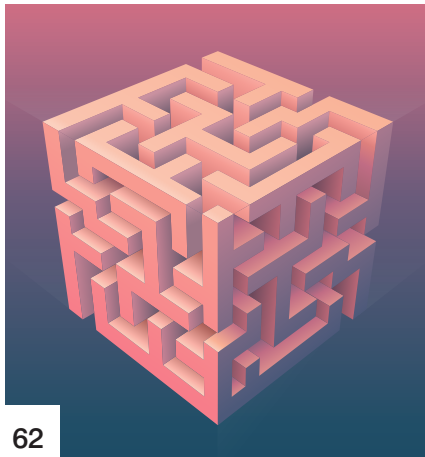
40



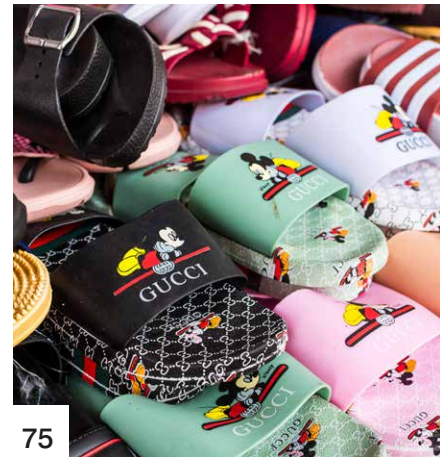
46



56



62



75

Regulars

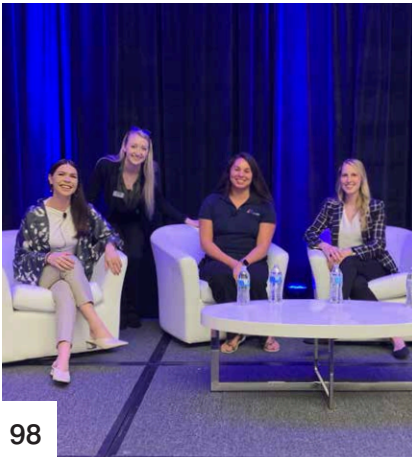
- 9 *Editor's welcome*
- 10 *News*
- 16 *New products*
- 20 *Installations*
- 25 *Mike Fairley column*
- 29 *Andy Thomas-Emans column*
- 31 *Continuous improvement*
- 34 *Branding and design*
- 37 *M&A*
- 39 *Young managers*
- 40 *Q&A: Cristian Reyes, Mayapack*
- 144 *Label trends*

Trends

- 46 *2022 predictions*
What's in store for the year ahead? Industry experts have their say
- 56 *The greener shade of beauty*
Shelf appearance is no longer the only priority of the beauty and personal care industry
- 75 *The brand protection market in China*
Opportunities for brand protection providers in China are set to increase rapidly in the coming years
- 95 *A greener footprint*
Global supermarkets are looking to reduce their packaging footprint. What will be the impact on the label and packaging industry?
- 130 *New look for craft beer*
As aluminum cans become harder to source, craft brewers are looking to converters for alternative labeling techniques

Features

- 62 *The global supply chain in flux*
Disruptions to the global supply chain have left converters and suppliers battling to stay ahead of the curve
- 70 *Seeing through touch*
How braille and tactile elements are incorporated into packaging
- 84 *Label your sustainability claims*
Investment in interactive labels will be crucial to building a regenerative retail economy
- 98 *Label Congress 2021 reunites industry*
The first Labelexpo-run event in 18 months drew 743 attendees and 57 exhibitors to Chicago
- 105 *Hitting perfect 21*
South African converter Coastal Labels evolves into Sullwald Printing Solutions after growing beyond serving only the coastal regions and just label clients



98



113



130



135

Technology

109 Covid and booze bans

The fallout from repeated alcohol bans in South Africa

113 Labeling start-ups

Start-up brands often face creative hurdles when it comes to packaging. Indian brand strategist Shivani Parmar says converters can help

117 Flex Films International sets up five new plants

India-based Flex Films International has embarked on a global expansion drive

123 Orianaa Décorpack diversifies and looks to invest

The Indian converter is diversifying into the wellness and pharma industries

129 TLMI award winners announced

US association names converter, supplier and volunteer of the year award winners

89 Actega's Ecoleaf completes beta testing

As EcoLeaf concludes its beta phase, a report on the updates and feedback from the technology

125 Yingcai transforms to digital with Durst

A small converter in China has made a significant investment in a Durst Tau 330 RSC press

135 The struggle of adapting to new technology

Amazing technology advancements can stall because of hesitancy to convert production lines with new applicators

141 Proofing: a snapshot in time

Tom Kerchiss, MD of RK Print Coat Instruments, on the challenges and importance of proofing

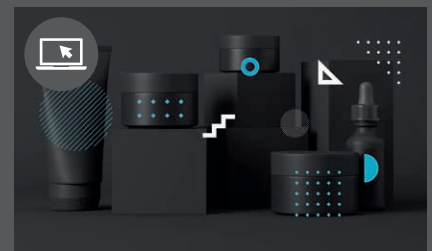
Online contents

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Flint Group discusses emerging trends in label industry (video)

Flint and Xeikon on the biggest changes in the label industry



Read L&L issue 3 online (magazine)

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



Smart, active and intelligent labeling (Label Academy)

New emerging technologies are extending the role of the label



TLMI discusses various committees and their initiatives (video)

Linnea Keen on resolving issues within the label industry

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L&L looks back (L&L issue 2, 1998)



P22 Labels & Labeling investigated a new technology using ultra-violet radiation to cure inks and coatings, potentially bringing about production efficiencies and reducing the costs of changing lamps. L&L's Barry Hunt spoke to Solatel, a UK-based firm offering the technology which could be used with minimum training by press operators.



P26 Labels & Labeling's Mike Fairley visited Altrif Label, a Netherlands-based label printer founded in 1983 in Roosendaal, to report on the converter's investment in multiple printing presses, a significant factory floor expansion and high-level customer service, which have elevated it to become one of leading players in the European market.



P80 Labels & Labeling reported on the latest release of Artwork Systems' Artpro packaging software, which represented a significant step forward. The new Version 4.0 allowed the import and export of PDF files with editing capabilities at the workstation, import of compressed PostScript, export of TIFF/IT, and support for Apple ColorSync.



P92 Labels & Labeling's John Carson spoke to Optichrome Computer Systems, gearing up to launch a sophisticated client-server management information system. Codenamed Optimus 2020, it was a crucial part of Optichrome's strategy to expand into niche markets, particularly direct mail houses, carton and packaging printers.

Challenges – and opportunities – ahead

Editor's note

L&L's annual 'Predictions' article, starting on page 46 of this issue, is always an interesting read.

A cross-section of views from suppliers, converters and industry commentators, it provides an effective snapshot of the major trends, challenges and opportunities being seen in the industry.

After a year (and more) of lockdowns and travel restrictions, of supply chain disruption, raw material shortages and price increases, it is little surprise that many of the contributors to the article are concerned about how far into the new year these issues will continue.

Ongoing supply chain disruption is possibly the most frequently cited concern, though some dissenting voices believe that a tapering off of demand will see the problems begin to ease. Rising costs

“It is little surprise that many of the contributors to our annual ‘Predictions’ article are concerned about how far into the new year these issues will continue. And yet certain threads of optimism can be found ”

are also a worry, while the recruitment and retention of talented employees is an existing challenge not created by the circumstances of the past 18 months, but certainly exacerbated by them.

And yet, amid these genuine challenges, certain threads of optimism can be found. As has been written on these pages during the last year and a half, many in our industry have prospered. And existing trends, which bring new opportunities with them, have

sped up. Just as, in the general workplace, practises such as working from home and video conferencing have ramped up more in a year or two than they might otherwise have done in ten, so too is rapid progression taking place in our industry in areas such as M&A, automation, digitalization and environmental sustainability – all cited by our contributors as opportunities for growth, waste or cost reduction, or improved efficiency.

Meanwhile, anecdotal

evidence garnered from conversations with companies who have signed up to exhibit at Labelexpo Europe 2022 in Brussels in April suggests that there is an impressive backlog of technological innovation on the supplier side that is bursting to unleash itself.

Advances in some of those trends mentioned above – automation, digitalization (such as in embellishment) and environmental sustainability – will undoubtedly be prominent in the halls of Brussels Expo. L&L will preview them in the next issue, our first of the new year. We look forward to seeing you in Brussels.

James Quirk
Group managing editor

News



The deal increases MCC's presence in Europe and Southeast Asia

MCC to buy Skanem's European and Thai operations

US group acquires seven Skanem facilities

Multi-Color Corporation has acquired Skanem Group's label operations in Europe and Thailand.

MCC is acquiring seven of Skanem Group's facilities in Denmark, Norway, Poland, Sweden, UK and Thailand. The transaction excludes Skanem's label operations in India and Kenya, which will remain in the Skanem Group and will be the platform for expansion in India and Africa.

Nigel Vinecombe, CEO of MCC, said: 'Skanem Europe gives MCC broader access to home and personal care, regional food and beverage, and other specialty markets, as well as an experienced team capable of building on existing and new growth opportunities. Skanem Thailand complements MCC Thailand and provides scale in this sizeable and growing Southeast Asian market. For a long time, we have recognized the success Ole Rugland and the team have had building an impressive portfolio of customers and operations. We are delighted MCC has been chosen to support future success.'

Ole Rugland, executive chairman of Skanem Group, added: 'Over the last 20 years, we have built a profitable and competitive label business in Europe, India, Africa and Southeast Asia. We have now reached a stage where our business in Europe and Southeast Asia, by joining a global player like MCC, will give the possibility for further growth.'

'In these regions, MCC and Skanem are highly complementary, and we believe that this will create new opportunities for employees and add value to our customers. The Skanem Group will continue to invest in India and Africa where we see exciting opportunities for further growth and expansion.'

The transaction is expected to close during Q4 2021.

ABG opens Spanish production facility

UK converting equipment manufacturer A B Graphic International (ABG) has opened a new manufacturing facility in Girona, Spain. The EUR 2m investment will also be used by Enprom Solutions, part of the group. The new production facility will manufacture ABG branded products and Enprom's nonstop winding machines, converting lines, sleeve machines and automated customized products. ABG and Kocher+Beck jointly acquired the Spanish converting machinery specialist in July 2019. The facility's opening was attended by ABG's owner Mike Burton and CEO Richard Knight; Lars Beck, owner of Kocher+Beck and Joan Marc Taboas, CEO of Enprom Solutions.



The two companies are joining forces with multiple objectives, including strengthening their North and South America presence

Armor acquires fellow thermal transfer ribbon specialist IIMAK

Armor-IIMAK now has 1,650 employees

Armor Group has acquired IIMAK (International Imaging Materials) to reinforce its position as one of the global market leaders in designing and producing thermal transfer ribbons. The combined thermal transfer activity will operate as Armor-IIMAK with consolidated revenue of more than USD 400 million. With the history of both companies dating back to the 1980s through a shared license from the Japanese company Fujicopian until 1998, Armor has enjoyed strong growth in Europe, with IIMAK similarly benefiting in the US. Armor-IIMAK now has 1,650 employees producing over 2.5bn sqm of thermal transfer ribbons.

Hubert de Boisredon, chairman and CEO of the Armor Group, said: 'Convinced of its strategic importance, I have actively pursued this merger and am especially proud to be able to announce this acquisition. Our main objective will be to unify our strengths to benefit our customers, partners and employees. I am absolutely delighted with this major acquisition, signaling a new dawn for the whole of Armor. It opens up new horizons throughout the group.'

The two companies are joining forces with multiple objectives, including strengthening their North and South America presence and offering customers a more comprehensive product portfolio. The new entity will also leverage joint technological development to enhance existing products, rapidly develop new ones, and reduce their carbon footprint through optimized logistics.

Christian Lefort, who recently joined Armor, will lead the entity. Doug Wagner, CEO of IIMAK, has been named president of Armor-IIMAK Americas. The new entity will enjoy global coverage via three coating sites, one in each of its regions (Americas, Asia and Europe), and nearly twenty slitting sites.

Hybrid Software acquires ColorLogic

Hybrid Software Group has acquired ColorLogic, a color profiling and conversion software company based in Rheine, Germany. ColorLogic was founded in 2002 and has developed an extensive portfolio of color profiling and conversion software.

Mike Rottenborn, CEO of Hybrid Software Group, said: 'ColorLogic has long been respected as an industry leader in extended gamut color management, and their tools provide the perfect combination of speed and quality for these demanding applications.' It is the fifth company in the Hybrid Software Group, joining Global Graphics Software, Hybrid Software, Meteor Inkjet, and Xitron.

News



An affiliate of Lone Star Funds, a global private equity firm, has bought Flint's XSYS division

Flint Group sells XSYS division to private equity firm

Steve Dryden will succeed Antoine Fady as CEO of Flint Group

Flint Group has signed a definitive agreement to sell its XSYS division, which specializes in the development and supply of printing plates, sleeves and adapters, and pre-press equipment to the packaging industry, to an affiliate of Lone Star Funds, a global private equity firm.

The terms of the transaction were not disclosed. Upon closing, the XSYS management team will be led by Antoine Fady as chief executive officer, Dagmar Schmidt as chief operating officer, and Martin Sauer as chief financial officer. Steve Dryden will succeed Antoine Fady as CEO of the Flint Group.

'The carve-out we are announcing today represents the next logical step for Flint Group and XSYS,' Fady said. 'It will further enable the XSYS business to advance as a standalone, best in class, full solutions provider to the flexographic and letterpress pre-press industries, with tailor-made solutions developed for each market segment and customer type. We look forward to working with Lone Star, whose experience and track record will be of great benefit as we move XSYS forward in this next phase.'

'With this transaction, we will create two dedicated management teams with increased strategic and operational focus,' said Steve Dryden, newly elected Flint Group CEO. 'Flint Group becomes positioned to further invest in the structurally growing segments of paper and board, flexible packaging and labels, serviced with our conventional and digital printing consumables. This successful strategy – centered around product and service innovation – enables Flint to grow with customers that value our color proposition by helping them to standardize and reduce their costs.'

GM partners with Sciprios

Converting equipment manufacturer GM has joined forces with Sciprios to provide R&D coating technology for both scientific research and industrial production in all areas of printed electronics.

One of GM's first customers in this area was the Solar Factory of the Future (SFF) at the Energy Campus in Nürnberg, Germany – a collaboration that is still ongoing. Sciprios was founded in 2018 as a spin-off from the SFF and the Bavarian Center for Applied Energy Research (ZAE Bayern).

'This official announcement of our partnership is based on several years of fruitful collaboration,' said Uffe Nielsen, GM's CEO. 'Earlier this year, we took the next step and introduced the second generation of our Solar Coating Platform, which has been developed with Sciprios. We are now extending that cooperation to also include sales, customer support and service, and consumables, as well as coating workshops and demos.'

The Solar-300 is a coating and printing platform available in widths of 330, 500 or 550mm or in a custom size. Completely modular, it can be configured with multiple slot die-coating stations, gravure coating, flexo printing and rotary screen printing. It features the option to add laser cutting and inkjet printing in-line for manufacturing printed electronic devices in one pass.

News in brief

Avery Dennison acquires Vestcom

Avery Dennison has acquired Vestcom for the purchase price of 1.45 billion USD. Vestcom is a provider of pricing and branded labeling technology at the shelf-edge for retailers and consumer packaged goods companies. It uses data management capabilities to synthesize and streamline store-level data and deliver item-specific, price-integrated messaging at the shopper's point of decision.

Resource Label acquires StickerGiant

Resource Label Group has signed an agreement to acquire Colorado-based StickerGiant.com. Created by John Fischer in 2000 as one of the first online sticker companies, StickerGiant has evolved into an industry leader in e-commerce sticker and custom label manufacturing.

Prime Label acquires LabelPrint

Prime Label Group has acquired LabelPrint, a leading Estonian label converter. This is the fourth converter to join the group as it continues to expand across Europe. 'The acquisition of LabelPrint certainly strengthens our leading position in Central Europe and prepares us for further expansion into the Baltics and Scandinavia. With the acquisition, the group's share of sales outside of Poland will exceed 60 percent,' said Arkadiusz Sapiecha, CEO of Prime Label.

Etiflex joins Optimum Group

Etiflex, a Danish self-adhesive label converter, has joined Optimum Group's Nordic platform. The current management will remain in place. The Optimum Group now consists of 16 companies located in the Netherlands, Belgium, Germany and Denmark.

Maxcess Europe expands service into Romania

Maxcess Europe has expanded its Europe Division by opening a sales office in Brasov, Romania.

News

Imprima to represent GEW

GEW has appointed Madrid-headquartered Grupo Imprima to represent the company across Spain and Portugal from October 2021.

GM appoints India agent

Converting equipment manufacturer Grafisk Maskinfabrik (GM) has appointed Printers Supply Company as its distributor in India.

Fortis acquires QTL

Fortis Solutions Group has acquired fellow US converter Quality Tape and Label.

Reproflex3 acquires Opti-Flex

UK pre-press firm Reproflex3 has acquired New Zealand-based Opti-Flex to expand its global network. The companies will merge into R3 NZ Limited.

Esko appoints global distributor

Esko has signed a partnership with US-based Corbus, which will distribute Esko's range of pre-press software. The deal will see Ohio-based Corbus acting as a global distributor of Esko software.

Labeltech appoints DACH distributor

Germany-based Dortschy has been appointed as a distributor by Italian finishing equipment manufacturer Labeltech in Germany, Austria and Switzerland.

Dortschy has 70 years of experience in the printing industry with a sales and service network spread around Germany and Austria.

Siegwerk partners with Rotopack in Pakistan

Siegwerk has signed a joint venture agreement with Rotopack, one of the leading suppliers in Pakistan's printing and packaging industry. The jointly owned new company Siegwerk Pakistan will start business in Q2 of 2022.



It is the largest organic investment in Elkem's European silicones franchise in a decade

Elkem expands production plant in France

36m EUR investment in Roussillon plant

Elkem has invested around EUR 36 million to upgrade and debottleneck its silicone upstream plant in Roussillon, France. The investment is expected to unlock new specialty silicones supply for customers in Europe, EMEA, and the Americas.

The board of directors has approved a 20,000 metric tons capacity expansion, bringing the effective silicone intermediates capacity from Elkem's upstream plant in Roussillon, France, to 100,000 metric tons per annum while delivering productivity, cost, sustainability, and climate protection improvements. 'At a time when silicones and their raw materials are in shortage, the expansion is a cornerstone to meeting the future needs of our specialty silicones customers in EMEA and the Americas, where the market is expected to grow by around six percent per year between 2020 and 2025,' said Frédéric Jacquin, senior vice president in charge of Elkem's silicones division. 'This investment complements the ongoing capacity expansion at our Xinghuo site in China, which primarily serves growth in the Asia-Pacific region and further strengthens our cost position as well as environmental performance.'

It is the largest organic investment in Elkem's European silicones franchise in a decade. It is anticipated to come online during the third quarter of 2023. The decision confirms the importance of the Rhône Valley for Elkem's silicones division after the company agreed to acquire a third manufacturing site in the area and announced the opening of a new global research and innovation center.

CELAB to show liner recycling at Labelexpo

The Circular Economy for Labels (CELAB) consortium and Labelexpo are collaborating to showcase new matrix and release liner collection and recycling initiatives at Labelexpo Europe 2022 in Brussels on April 26-29 next year.

The global consortium, which now includes 32 member companies, is dedicated to increasing liner and matrix recycling rates to bring the self-adhesive labeling industry into line with circular economy programs promoted by governments and regulators worldwide. CELAB is organized into regional branches, with the European division hosted by Finat. Francesc Egea, director at IPE Labels and Sleeves and Finat's vice president, represents the association on the CELAB-Europe steering group. Underneath the European steering group, several workstreams are focusing on data mining, liner and matrix recycling technologies, collection logistics, regulatory affairs, and communications.

CELAB estimates there are 1.6 million tons of label liner sold worldwide, of which 25 percent in Europe, with a current recycling rate of approximately 20 percent. One of the consortium's goals is to increase it to above 75 percent of the continent's used release liner and matrix material to follow a circular route by 2025.

The main challenge to be examined at Labelexpo Europe 2022 is making recycling economically viable in the face of technical complexity and high transportation costs arising from the fragmented distribution of liner and matrix materials.



Sustainable, Versatile, Highly Appealing.

SHAPE360® TDS is a high TD shrink clear label film that improves PET bottle recycling quality and efficiency by ensuring the separation of floatable printed sleeves from rigid PET flakes.

TDS is compatible with polyolefin sorting streams and is therefore a perfect solution for PP and HDPE containers resulting in recoverable all-olefin packages.

The film is certified as recyclable by Interseroh with its "Made for Recycling" seal and by the European PET Bottle Platform (EPBP). It has received critical guidance recognition by the Association of Plastic Recyclers (APR) for its recyclability with PET, colored HDPE, and natural HDPE containers.

TDS maximizes product differentiation and brand shelf-appeal by providing a 360-degree billboard decoration. Its inherent versatility makes it the perfect choice to decorate containers in a variety of shapes and sizes and made from different materials. Furthermore, the film's strong seaming is achieved using *Ti's* natural-based solvents.

The full range of SHAPE360® shrink label films is part of Dynamic Cycle™, Taghleef Industries' set of initiatives aimed to address sustainability issues and contribute to the quality of life of generations to come.





Grzegorz Dołbniak,
CEO, Rotometal

How the Printing Industry can join the Customer 5.0 revolution.

Recently Rotometal were invited to talk at Conferência Intercontinental de Flexografia 2021. The theme of the conference was Industry 5.0. We wanted to take the opportunity to share our perspective on how we try to put the customer at the heart of our business. We're going to share some of the things that have helped us in the hope that they can help you.

"If you are able to truly know your customer, you will be able to design for them. It's important to be ready for the new reality of customer relationships."

Three easy steps to become Customer 5.0 ready:

1. Start with short-term, easy fixes. Acquire the technology, that would make your manufacturing process more efficient and therefore free your employees time to really work their creative and problem-solving skills.
2. Become obsessed with your customer. Look at data you have available. Analyse how do your customers shop? What do they buy?
3. Collaborate with customers and suppliers. Contact your key suppliers and customers. Ask them how you can work closer with them.

What is Customer 5.0?

Our definition is based upon the industry 5.0 definition that truly focuses on mass customisation of the customer experience. It's rooted in the changing of customer habits, desires and expectations. It's been an ongoing process that has been further accelerated by the pandemic. It has led to a change in customer behaviour around internet shopping, expectations around speed and the ability to order what they want, when they want it. This change applies equally to our partners, be they, buyers or suppliers, as it does to the end customer.

Why think about Customer 5.0?

This is so important because it helps you to truly understand your end customer. If you are able to truly know your customer, you will be able to design for them. This applies irrespective of your product or service. It's important then to try and take steps to proactively be ready for the new reality of customer relationships.

How can we start on the Customer 5.0 journey?

Let's revisit those three steps mentioned above. Easy wins, customer obsession, and collaboration.

The easy wins

Those short term easy fixes. They're a great way to open the door to the rest of the process of change. Sometimes it's freeing your teams from the day to day

that will allow for the greatest leaps in innovation for your customer. Often these fixes require looking at the current technologies or processes you are using. If you're in manufacturing think tools that will allow quick changeovers and set ups, think tools with reduced risk of damaging and being damaged and think tools that take no time to clean. Identifying opportunities like this can really help you free time up for further improvements.

Really understanding your customer.

Building into your business a really deep obsession with your customer will help the transition. There a few ways you can approach this. Really though it comes down to three steps, inquire, listen and personalise. You need to inquire, design and understand how products are used, needed and purchased. You need to think customer experience mapping audience insights. A huge amount of this will be about asking questions, not just to your customers but also the end users. Then, you need to listen. One of the biggest mistakes businesses make is that they ask the right questions, they just fail to listen to the answers. Find out and understand what they want and need and how you can help them. And lastly, you personalise. Isn't it funny that we've been able to build and purchase a customised car online, but we've not been able to do the same when purchasing for our manufacturing facilities to fit our precise needs and know that it can be made to order at no additional cost or dela

Finally from our three suggestions is collaboration. This is all about creating relationships with suppliers and with customers. Going beyond a good personal relationship to one that helps each other to grow. To be able to achieve this, real openness and honesty is required. Fostering this environment, talking to suppliers and customers about key challenges can open doors to innovations that will allow both businesses to thrive. Just as importantly, it can allow you to see the opportunities for greater efficiencies, cost savings and even new products and services.

Customer 5.0

What it all means for the customer is, they get the flexibility and human touch they expect. They receive the perfect product fast, but they know people are still at the heart of the process. They are given the peace of mind of being listened to and being in control via us, manufacturers, allowing the collaboration on the line human/ human and human/ machine.

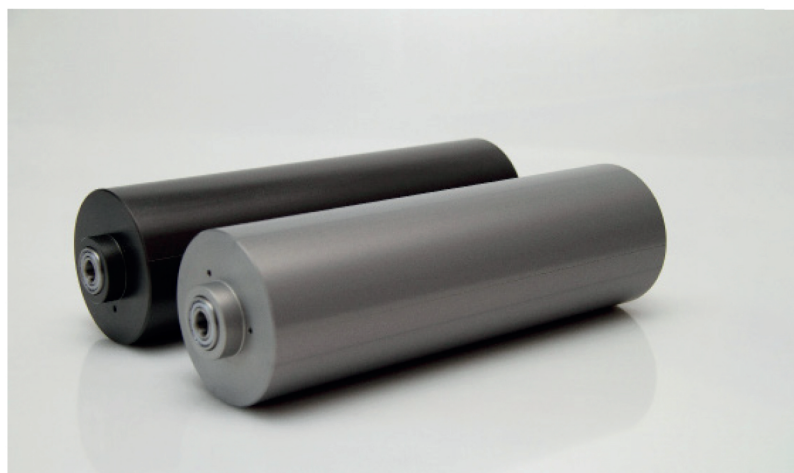
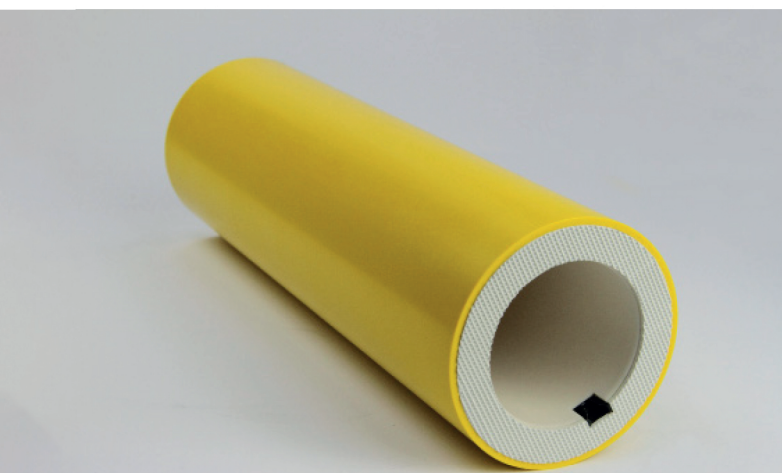
This is Customer 5.0, the perfect cocktail; human design meets human needs, and seamless, fast, efficient, flexible manufacturing in between.



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We advise

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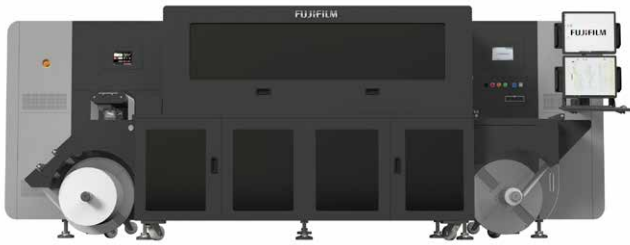
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New Products

01



03



01 Label Press LP350

Fujifilm North America

The LP350 digital label press, planned for release in early 2022, uses CMYK as well as orange and violet inks to hit 94 percent of the Pantone color gamut. In addition, double white inkjet channels enable high opacity levels for a wide variety of label applications. The LP350 can print at 600 x 600 DPI resolution with a 4-level grayscale and interstation UV pinning. The LP350 also can print at 164 feet per minute, regardless of the number of colors or media types required for the print job. The press will be available in both 13in and 9in widths.

Digital Care Label

Avery Dennison

Avery Dennison has partnered with lifestyle brand UpWest, and ReCircled, an apparel and footwear recycling company, to demonstrate how its Digital Care Label technology can be used in an upcycling context and provide a brand experience.

According to current legislation, all garments sold must have a physical care and content label to communicate product information. Avery Dennison's Digital Care Label offers this information through a digital experience that showcases to consumers the sustainability story around the garment's origins and where they can dispose of it.

02 SunPak DirectFood Plus ink
Sun Chemical

SunPak DirectFood Plus is claimed to offer greater color vibrancy and accuracy with a wider color space than its predecessor, SunPak Organic. It delivers lithographic stability on the same level as Sun Chemical's standard low migration inks, such as SunPak FSP. The combination of SunPak DirectFood Plus and SunSpec SunStar DFC water-based barrier coatings now gives printers and brand owners the option to replace plastic barriers and inserts in paper packaging.

03 Evolution Series coatings

Flint Group Narrow Web

Two new UV flexo coatings, Evolution Deinking Primer and Evolution Caustic Resistant OPV, were developed to improve recyclability of shrink sleeves and pressure-sensitive labels and designed to increase the yield of material in the recycling process. The Association of Plastic Recyclers has recognized both coatings as complying with the critical guidance for PET packaging. Neither the deinking primer nor the caustic resistant OPV impacts ink color, image quality or code readability.

Recyclable hot-fill pouch

Uflex

Uflex partnered with Mespac, a flexible packaging manufacturer, and Hoffer Plastics, a manufacturer of custom injection molded parts, to develop recyclable mono-polymer hot-fill pouches. The pouch is 100 percent recyclable with its new mono-polymer structure and

spout caps. The single material PP-based hot-fill pouch combines the strength of OPP and CPP layered laminate structure designed by Uflex

04 DigiLase 4.0

A B Graphic

The upgraded version of the digital laser cutting machine now includes individual piece options, which will interest web-to-print businesses looking to provide their customers with enhanced marketing capabilities. The latest workflow offers barcode scanning, which enables the automatic changeover of the jobs. The machine's modularity enables integration of ABG's Digijet module for digital embellishment.

42Rpo adhesive

Herma

Herma has added 42Rpo to its portfolio of removable adhesives. The new adhesive can be applied to any label material including thermal paper. A conventional coating with an

New Products

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opaque effect cannot be applied to the back of this type of paper because of its sensitivity to heat, said Herma. With 42Rpo, the opacity originates from a special blue pigment that gives color to the adhesive without compromising its removable properties. 'As far as we're aware, there are no similar adhesives on the market,' said Ralf Drache, head of self-adhesive sales.

Central 6.0

Teklynx

Teklynx Central is built to increase operational productivity and handle labeling of any complexity while integrating with on-premise or cloud-hosted ERP business systems. It maximizes labeling efficiencies, compliance and control by offering an off-the-shelf software application. The new package is cloud-ready and offers new features to help manufacturers establish better connections throughout their supply chain.

05 PicoColour 254HD

Dantex

Dantex Digital has expanded its Pico range with the launch of the new PicoColour 254HD digital press, offering 2.5pl dot size, an effective resolution of 1200 x 1200 DPI, and printing speeds of up to 50m/min. PicoColour 254HD is available with compact in-line finishing. 'Our new PicoColour 254HD is the perfect addition to our growing range. With the market readily accepting inkjet as its future, we have listened to our customers and increased versatility across the portfolio of presses available,' said Ben Danon, CEO of Dantex Group.

06 Inkjet Test Platform

Matti Technology

The Inkjet Test Platform, suitable for a small production or laboratory environment, is designed to test different print components and materials used in a digital inkjet system. All components can be rearranged. The system tests printheads,

dryers, inks, substrates, print quality, and produces customer samples or proofing applications before printing. The platform allows the user to test different ink formulas, create several color sequences to achieve the desired color and vividness, experiment with different dryer systems, and access settings that influence the jetting behavior and ink interaction on the substrate.

07 SleeveWatcher

Intravis

The German vision inspection specialist has unveiled its first system designed for sleeve label production lines, featuring hardware and software prepared for specific challenges such as glossy surfaces or unusual shapes. The SleeveWatcher conducts a 360-degree label inspection of 100 percent of the product flow at speeds of up to 15 objects per second. To avoid high reflections of light during the inspection process, Intravis developed adjusted lighting technology,

which illuminates the entire inspection area and produces a homogeneous light. This minimizes the risk of reflections and false rejections.

08 Shape360 shrink film

Taghleeff Industries

Taghleeff Industries has launched Shape360, a range of sustainable and versatile shrink films featuring new and updated Shape360 TDS and designed for commercial sorting and recycling systems. Shape360 TDS is a high TD shrink clear label film that improves PET bottle recycling quality and efficiency by ensuring the separation of floatable printed sleeves from rigid PET flakes. Thanks to its low density, the weight of the label is reduced.

iD Cloud Platform

Nedap

The new platform is an integrated SaaS package built to enable inventory visibility across supply chains. It allows retailers and brands to create inventory

New Products

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visibility with zero waste and no losses by tracking every item movement throughout the supply chain and collecting data in a cloud-based inventory repository, whether in-store, a distribution center, or through loss prevention efforts.

09 optiFlex ecoFocus line FLEXcon

The new white and clear products use FLEXcon's V-127RE adhesive to maximize the recyclability of HDPE containers. In addition, the TRACrite 1.2mil polyester liner contains up to 60 percent post-industrial content. Applications include food and beverage, health and beauty, and household chemical. The films offer conformability to BOPP products, making them suitable for rigid, semi-squeeze and full-squeeze HDPE containers without concerns about darting labels during use. They are printable using multiple processes including flexo, digital, rotary letterpress and rotary screen.

10 Labelmaster Gallus

Gallus has added new features to its Labelmaster press aimed at improving operability and reducing waste. It now features corona treatment, web cleaning, transport and web tension integrated into new winding units. Compared to the previous version, the compact design enables reduced waste thanks to a machine shorter by up to 3.3 meters. The winder units can now be operated directly on the winder. All parameters can still be viewed and adjusted centrally via the touch panel. The substrate loading process has been redesigned with a new trolley system to quickly load and unload without touching the ground.

MIS Cerm

Cerm has extended its MIS with a complete and scalable end-to-end option for converters in the folding carton and rigid boxes space. According to the company,

the MIS increases the productivity of packaging converters thanks to its focus on the technical packaging production process and the specific interfaces to partners within this branch of the printing industry.

11 Digital Security Label U-Nica

The Swiss company focused on digital brand protection has launched a Digital Security Label (DSL) to allow brand owners to protect and trace their products using a cloud-based management system. DSL is a customizable adhesive label that features three essential components: a scryptoTrace code, serialization and PixelCloud.

Smartflow Software

The new version introduces Master Datasheets to increase consistency and content control. Using a central location for packaging content, Smartflow 26.2 enables users to curate,

review and approve content for product lines or product portfolios and provides pre-approved content that can be used to speed time to market.

12 PaperBarrier Seal Coveris

Coveris has teamed up with Austrian paper manufacturer Brigl & Bergmeister to launch PaperBarrier Seal. This fully recyclable, sustainably sourced packaging material offers the same functionality and product safety as existing packaging alternatives. The material is unique thanks to its paper coating, enabling sealability while remaining fully recyclable in current paper streams. The material is available in three versions offering different barrier properties, including moisture, oxygen, grease and mineral oils.



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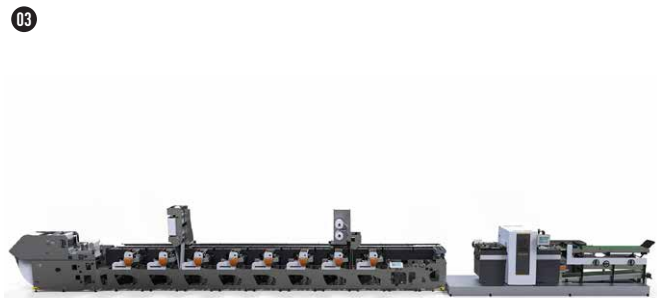
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For more information, visit www.wacker.com/dehesive

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Installations



01 Lombardi Synchroline 530
Weber Packaging, UK
 The Lombardi Synchroline 530 flexo press incorporates a Leonardo automatic turret rewriter and offers 530mm wide print capability with five colors. Patrick Hughes, MD at Weber Packaging Solutions, said: 'The investment provides us with some great new capabilities to provide innovative products and services for our customers who demand more than 10 million linear meters of labels every month.'

02 HP Indigo 25K
Labelisten, Germany
 Labelisten has invested in an HP Indigo 25K Digital Pouch Factory to produce pouches and roll stock. According to HP, compared to conventional methods the system reduces the production process from several weeks to a single shift, enabling converters to produce shorter runs economically. The set-up includes an HP Indigo 25K digital press, a Karlville PackReady

thermal laminator, and a Karlville Pouchmaker KS-DSUP-400. 'We are very proud to launch Germany's first HP Indigo 25K Digital Pouch Factory,' said Frank Plechschmidt, owner of Labelisten. 'The investment emphasizes our commitment to sustainability. Moreover, we are convinced that we have kick-started the digitization of the packaging industry.'

03 Edale FL5
New York Label & Box Works, USA
 The first Edale FL5 in the US is a 510mm (20in) web width, 8-color single-pass flexo carton and label press with in-line flat-bed die-cutter. With the new FL5 the company will be able to achieve all its printing requirements in a single-pass. 'A big factor for our investment was the ability to embellish in-line, including top and reverse printing, film lamination, cold foil, and the use of specialty UV ink. There are so many advantages to run

everything in-line rather than on separate pieces of equipment as in a typical sheet-fed factory which takes more time, needs more people, and ultimately costs more,' said Steven Haedrich, president of New York Label & Box Works.

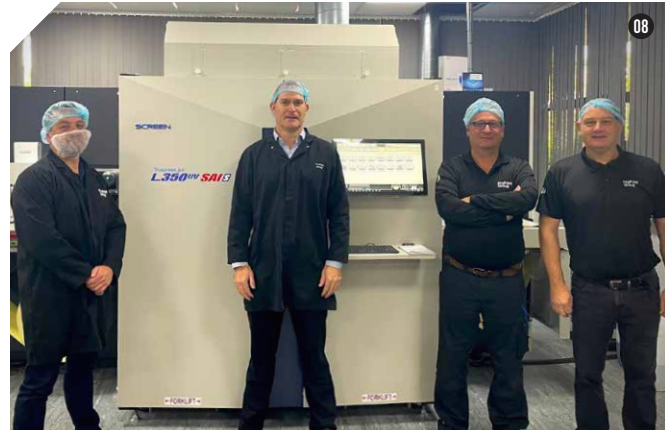
04 Brotech CDF-330
P. Lenzlinger, Switzerland
 The installation represents the first Brotech CDF-330 in Switzerland. The finishing system is equipped with a die-cutting unit, a corona unit and a flexo unit with LED drying. 'We are very happy to be the first user of Brotech in Switzerland,' said owner Pierre Lenzlinger. 'The machine is equipped with fast set-up time, high accuracy and high die-cutting speed. We are amazed at what has been achieved with the die-cutting technology.'

Vetaphone corona treatment
Zircon Technologies, India
 Sanjeev Sondhi, director of Zircon

Technologies, said: 'Vetaphone is the inventor of corona treatment. Its name is synonymous with corona treatment. It is Zircon's resolve to prefer state-of-the-art equipment to enhance the quality of our filmic labels.' The sale and installation of the corona treatment systems were handled by the company's India agent Weldon Celloplast.

05 Grafotronic DCL2
Special Screen, Italy
 The Italian label converter has installed the country's first Grafotronic DCL2, which has a 110m/min semi-rotary die-cutting module to increase production capacity and flexibility. 'We decided to choose Grafotronic mainly because we were looking for a very flexible and versatile machine, and DCL2 perfectly fits our needs. We also trusted in Grafotronic's online service capabilities with local sales and service support it has in our area,' said Antonio Locatelli, CEO of Special Screen.

Installations



05 MPS EXL-packaging 680 Omnicell, USA
Omnicell has installed a new flexo press to ramp up its production to meet the demands of the medicine packaging market. After rigorous OEM testing, Omnicell decided to purchase an MPS EXL-packaging 680 flexo press equipped to produce complex blister packaging in a single pass. It includes hot-air dryers, automatic unwinders, inspection technology and a stacker. The Omnicell press is the longest built by MPS, at 118ft (36m). Manufactured for blister packaging production up to a 26in web width, the EXL-packaging press runs over 500ft/min. The press is equipped with connectivity options, linking it directly to the MPS service team.

Lemorau MEBR+ BD Sérigraphie, France
BD Sérigraphie has invested in three pieces of equipment from Portuguese manufacturer Lemorau: a MEBR+ digital

finishing machine, CT1500 core cutter and a roll lifter, for its new production plant in Castejalous.

06 Konica Minolta AccurioLabel 230 MD Graphics, India
The Delhi-based converter has installed the new digital label press to target FMCG, pharma and cosmetic label segments. The company is already planning to invest in another Konica Minolta press for its Dehradun plant. 'If the demand grows, we might install it sooner. As we enter the pharma industry, we observed that there are a lot of pharma companies and we plan to target them,' said Dheeraj Sharma, owner of MD Graphics.

Baldwin Technology UV LED curing Label Products, USA
In a deal reached during Label Congress 2021 in Chicago, US converter Label Products has committed to converting the bulk of its flexo label production

to UV LED and 100 percent image inspection from Baldwin Technology, and connecting all available data on its presses via Baldwin's AMP IoT Industry 4.0 platform.

07 Bobst Mouvent LB702-UV NTE, France
Nord Technique Etiquetage (NTE), a family-owned company based near Lille, has become the first in France to install a Bobst Mouvent LB702-UV. It is the second investment in a Bobst machine after it purchased an M4 in-line flexo press in 2016. The investment in the digital press is in response to an increased demand for shorter to medium-length runs. The Mouvent LB702-UV addresses 90 percent of all label jobs up run lengths of 8,000 linear meters (26,000 linear feet), delivering an output of up to 200,000sqm (2.1 million sq ft) per month, with printing speeds of up to 100m/min (330ft/min) delivering 1,200 x 1,200 DPI native resolution.

08 Screen L350UV+ ProPrint Group, UK
ProPrint chose the latest Screen digital press to meet demand for self-adhesive labels across various sectors. An increase in sales growth and customer appetite for premium digital label printing within short lead times also drove the investment, which is expected to increase digital label capacity and achieve better flexibility with new label applications. 'The Truepress Jet L350UV+ increases production speeds and reduces material waste due to being compact and highly efficient. Because of Screen, our digital capacity has doubled,' said James Denny, director at ProPrint Group.

Fujifilm Flenex plates Lefrancq Imprimeur, France
The French label and leaflet specialist has invested in Fujifilm's water-washable Flenex plates to increase print quality and productivity while reducing emissions. Fujifilm's plates and accompanying SB-Series

Installations




processor and water filtration unit have reportedly helped the converter maintain the standards it sets itself for social and environmental responsibilities.

09 Jetsci ColorAqua PlusPrint, Romania
PlusPrint, a signage and promotional items customization specialist, has invested in a Jetsci ColorAqua digital press to expand its production capabilities into a wide range of applications for the short-run labels and security printing segment. 'We were looking for the latest technology in roll-to-roll label printing that would offer top quality and productivity at a very good cost. We are happy to be among the first companies in Europe to have access to this new technology offered by Jetsci Global in partnership with Memjet. The quality and productivity of this machine are unmatched in the industry by any machine in its price range,' said Ionut Buhagiar, managing partner at PlusPrint.

10 Two Mark Andy Evolution Series E5 ATB-Systemetiketten, Germany
The Germany-based converter, part of Barthel Group, has installed two Mark Andy Evolution Series E5 narrow web flexo presses fitted with LeoLED technology developed by GEW. The servo-driven Evolution Series presses, 4-color, and 8-color versions, feature 430mm (17in) web width and a high specification, including web cleaning and corona treatment. The 8-color machine also has an overhead rail system for moveable unwinding/rewinding for cold foil and lamination and die-cutting units with adjustable counterpressure. The GEW LeoLED systems chosen for the new Mark Andy presses offer conventional mercury arc and LED lamp UV curing. This affords ATP the flexibility to use inks and lacquers of both types, as not all are available in the LED formulation at present.

11 Dantex PicoColour Clover Chemicals, UK
Clover Chemicals print all its labels in-house; therefore, producing labels on-demand reduces the requirement to hold large stock quantities. The company can now design and print a new label within a few hours to service its customers more efficiently. The PicoColour offers a printing width of 210mm (8.25in) and a running capacity of 25m/min (82ft/min). It works with UV-based inks and is available with CMYK + white. 'As an all in-one-system, the PicoColour is perfect for our in-house needs,' commented Clover Chemicals' Andy Hilditch. 'As the UV ink is scratch-resistant and doesn't require additional coating or expensive lamination, it provides excellent chemical resistance, thereby ensuring that all health and safety guidance is clear and visible at all times no matter what environment our products are stored in.'

12 Nilpeter FA-17 MSO, Ireland
FMCG packaging specialist based in Belfast, Ireland, has acquired a new 10-color Nilpeter FA-17 UV-flexo press. Nilpeter and MSO completed an online factory acceptance test, and the press will now be shipped to Ireland. Paul Devlin, operations manager, MSO, said: 'MSO is currently investing heavily in upgrading equipment throughout the factory. For the investment in the labels department, we are focusing on increasing our current efficiencies as well as providing ourselves the opportunity to explore new markets, and the Nilpeter FA-17 ticks all the boxes. We have a long-standing positive relationship with Nilpeter and look forward to continuing that into the future.'

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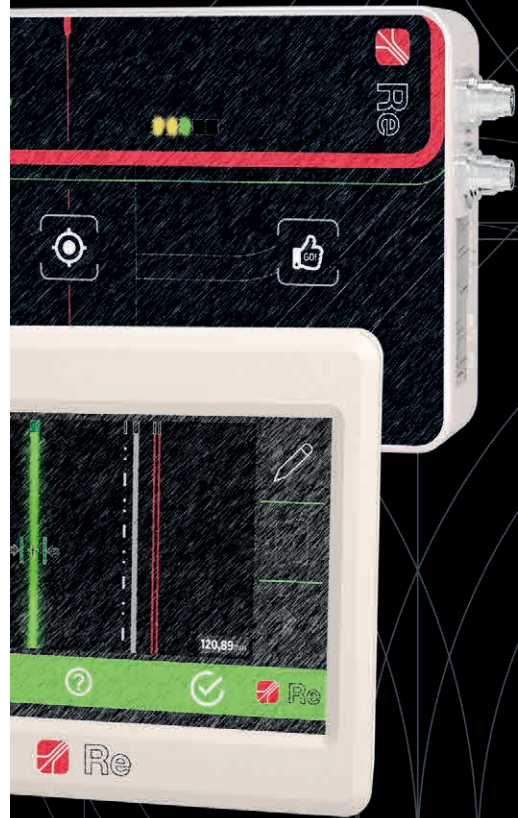
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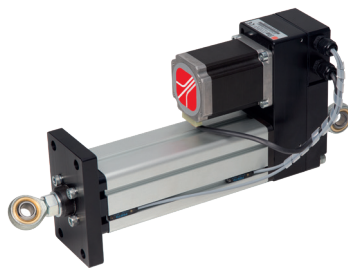




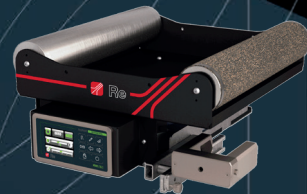
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ARE NEEDED
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WEB GUIDING SYSTEM



LINEAR ACTUATORS



WEB GUIDING SYSTEMS



The Mike Fairley column

Workplace safety in the world of labels

Accidents in label printing plants might be rare, but care must be taken

With in excess of 20,000 self-adhesive label presses in use worldwide, together with increasing numbers of flexible packaging and shrink sleeve printing presses, it would not be surprising if printing and converting machinery related accidents were somewhere near the top of the list of reported industrial accidents each year across all industries and sectors.

Just think of how many printing cylinder nips, unwind and rewind rolls, die-cutting units, specialized finishing systems, tension control systems, turret rewinders, UV-curing units, waste removal and web handling rollers are in operation in the label industry almost every day, and the possibilities there are for accidents to occur during make-ready, attending web breaks, freeing blockages, during machine setting, cleaning or maintenance. And that's just on all those printing presses operating with anything from four to nine print units.

“Accidents in the label industry have been seeing a steady decline for many years. Let's keep it that way”

Add in all the related inspection rewind machines, slitters, embossing and punching machinery, foiling machines, coaters, splicers, core cutters, inspection systems, air trim removal, web cleaning and corona treating equipment, and it all adds to the potential for a high number of machinery-related accidents, some possibly quite serious, each year.

Yet this is not the case. Print related industry accidents, including label production (both printing and converting), are far from the top of the total of all global industrial and workplace accidents which, according to the International Labour Office, currently add-up to in excess of 337 million occupational accidents and 160 million victims of work-related illnesses worldwide each year.

Globally, the print-related industries have tended to be statistically grouped under the 'Other manufacturing' category of accidents, coming-in behind food and drink manufacturing, chemical and pharmaceutical products, metal fabrication and manufacture of transport products in the number of accidents each year. Outside of manufacturing, the construction industry is one of the leading sectors of workplace accidents.

Even within the print and paper converting sectors globally, machinery accidents are usually only around the third cause of all the accidents and injuries, coming in behind manual handling (around 26 to 27 percent of the industry's accidents), slips, trip and falls at between 19 and 22 percent, while contact with machinery is down at anywhere between 12 percent and 22 percent (depending

on country and how statistics are compiled).

Most of the printing machinery accidents that do occur could often have been easily prevented through the proper usage and maintenance of guarding, combined with enhanced instruction and training, and eliminating or minimizing potential accident hot-spots on and around the press.

The label industry's leading manufacturers have done much in recent years to make press operation as safe as possible, automating servo controls, print units and die change, introducing electronic setting of anilox rollers and print pressure, together with the automated loading of previous print settings to minimize press set-up handling.

As a consequence of improved training, advances in press controls and automation, as well as more sophisticated machine guarding, the printing industry's incidence of machinery accidents has tended to experience a decline in most years since the millennium. Indeed, the data that is available indicates that while it's still quite possible to get hurt (or very occasionally even killed) in a printing plant, print firms offer their workers a safer environment than private-sector industry as a whole.

Entangled

Where label machinery accidents do still occur, it has most commonly been due to contact or getting entangled with dangerous moving parts, including in-running rotating nips, such as between printing cylinders, rollers, gears and transmission machinery. Many of these could possibly be put down to older machinery where levels of automation and guarding are less sophisticated. Long, untied hair, loose work clothing and jewelry all pose obvious entanglement hazards and should always be avoided.

Around three-fifths of the industry's reported machinery accidents have historically occurred during cleaning, making-ready, webbing up or attending to web breaks.

A further one in five of the accidents occur while the operator is freeing jams or blockages, and while machine setting. Between them, machinery accidents are most likely to lead to a variety of cuts and bruises, lacerations, fractures, dislocations and crush injuries to fingers or hands.

However, as already mentioned, it is manual handling involving lifting, lowering, carrying, pushing and pulling that comes out as the main cause of accidents in printing and paper converting, not uncommonly occurring in areas such as warehousing, storage, reel handling, moving pallets or ink containers, and where picking and packing are taking place.

Another key area of manual handling accidents in the label world is those that involve the handling, setting-up, cleaning, inspection or storage of cutting, embossing, foiling, sheeting or perforating

cylinders, anvils and support rollers. Certainly, solid rotary cutting, embossing or foiling tools can be quite heavy and a challenge to lift in and move in or out of the converting line and handle safely without risk to the operator (or the tool).

Such tooling can be heavier, harder to handle, bulkier and potentially more likely to cause damage than in many other label production applications. Whether flatbed, rotary or flexible cutting dies, they all have sharp edges and can lead to cuts being sustained during handling, set-up and adjustment.

Yet the basics of lifting and moving heavy or awkward shapes are not always well explained. A good guide to handling, storage and safety consideration in the handling of tooling can be found in the Label Academy book 'Die-cutting and Tooling'.

In addition, it should be noted that operators may need to adopt somewhat awkward postures when inserting or removing tooling or making on-machine adjustments. If these tasks are not carried out appropriately and safely there is obviously a risk of injury. Such injuries include work-related musculoskeletal disorders creating pain and injuries to arms, legs and joints, as well as causing repetitive strain injuries.

Manual handling injuries can have serious implications for the employer and the person who has been injured. Apart from the more specific areas of warehousing, storage, packing, and the handling of all kinds of tooling, they can occur almost anywhere in the workplace and heavy manual labor, awkward postures, repetitive movements of arms, legs and back or previous/existing injury can increase the risk.

Safety measures

To help prevent manual handling injuries in the label printing

“One in five of the accidents occur while the operator is freeing jams or blockages”

workplace, any potentially dangerous tasks should be avoided as far as possible. However, where it is not possible to avoid handling reels, tooling, boxes, pallets and the like, then employers must look at the risks of the specific tasks and put sensible health and safety measures in place to prevent and avoid injury.

Fundamental points to remember in the manual handling and lifting of heavy dies, reels, boxes, or awkward or difficult shapes are as follows:

- Get a good grip with the palm of the hands when lifting and handling, not just fingers only. Use protective gloves where necessary.
- Avoid standing and holding heavy tools or loads. Rest on a bench or platform of a suitable height if any delay is unavoidable.
- Never change the grip while carrying.
- Never persist in attempting to lift loads, reels, boxes, or heavy tools if there is a feeling of strain.
- Train workers to keep lifts below shoulders and above knee height.
- Educate workers about risks to the lower back related to handling and twisting.
- Use handling aids or hoists wherever possible.

After manual handling accidents, the second most common cause of accidents in the world of printing and label converting – and the cause of some 40 percent of all major accidents – is for those that involve slips, trips and falls. Most commonly, these types



of accidents are likely to occur in production areas or washrooms, and are followed by accidents outdoors, in stairways or car parks.

In label production areas slips, trips and falls are often related to spillages – of oil, ink, water or other fluids (which should be cleaned-up immediately, dried and signposted) – by pallets or other items extending into walkways, from label substrate and other production waste on the floor and not placed in suitable bins, from trailing cables (provide cable covers for temporary arrangements during maintenance or repairs), or from reel or pallet trolleys or trucks not placed in their designated storage areas. Outdoors, accidents may be due to rain and wet surfaces, ice or snow on the ground, untreated potholes and uneven ground.

Many of these types of these slip, trip and fall accidents in and around the factory can often be put down to poor housekeeping or poor maintenance. Monitoring and routine checks by managers, supervisors and maintenance staff, the investigation of incidents and the monitoring of reports to identify any reasons for failures, can be important in the minimizing of such accidents.

It might be useful to finish this accident review with some general principles for the avoidance of accidents in and around label and converting units and presses, and in the overall production and non-printing working areas. These can be summarized as follows:

- The provision of adequate information, instruction, training and supervision on all health and safety matters.
- The wearing of appropriate and suitable clothing. No loose clothing which may get caught. Wear good boots or shoes.
- Watching for oil, grease, ink or varnish around the machine and clean it up
- Keeping workbenches and floor areas tidy and free from waste.
- Checking that tools and equipment are not lying on the machine

when starting up.

- Knowing all the control points around the machine and how to stop in an emergency.
- Checking all guards are in position and working properly before starting the machine.
- Stopping the machine before making adjustments and always use the correct tools for the job.
- Never trying to move obstructions or blockages while the machine is still in motion.
- When working on a machine making sure that the power is shut off in a way that it cannot be started accidentally.
- Keeping all gangways and passages around machines clear of obstruction.
- Ensuring all waste substrate is placed in the proper containers.

It is worth reiterating that all employers in the global label industry will usually be required by legislation to have plans in place to manage health and safety in the workplace. Where five or more people are employed those plans should be put down in writing in the form of a health and safety policy statement.

There is also a legal requirement to assess potential risks to the employees' working environment before their employment begins (and to review this annually), and to record any significant findings.

Accidents in the printing and label industry have been seeing a steady decline for a good many years. Let's keep it that way. And if possible, reduce the number of accidents even further.



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

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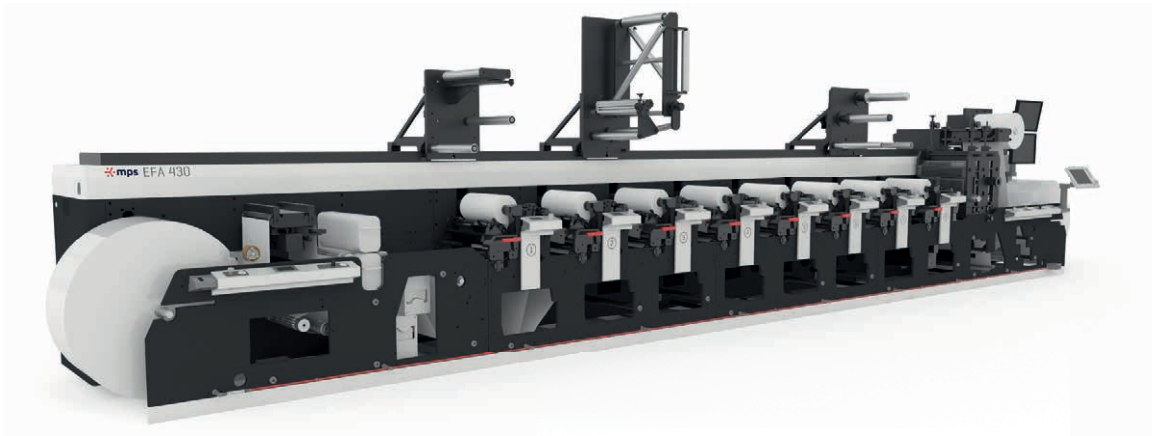
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The Andy Thomas-Emans column

Congress provides roadmap to the future

Four key themes were discussed during the recent Label Congress conference and Finat webinars

Label Congress 2021 in Chicago and the answering panel sessions organized by Finat to give the European perspective, together represent a fascinating roadmap for the label industry.

We can break the discussions down into four broadly related areas: supply chain challenges – even beyond the pandemic; digitization of the workflow; automation, Big Data and the impact of Industry 4.0; and what kind of skills label converters will need from the next generation of print factory workers.

To start with supply chain challenges, panelists on both sides of the Atlantic agreed that while Covid-19 has generally boosted key sectors of the label business such as food, drink and pharma, it has also brought to the fore wider supply chain issues: shortage of key raw materials, HGV driver shortages, container blockages at ports.

These pressures (see also the fascinating feature by my colleague Luis Rodriguez on p58 of this issue) are not likely to go away even when Covid is finally defeated. What the panelists are seeing is not only increasing lead times for label consumables – which will inevitably feed through to longer lead times for customers – but also price increases across a range of consumables which are harder and harder to pass on.

The discussion around digitization focused on the related topics of hybridization of print technologies and digital embellishment. Ultimately this promises to bring about a fully digitized label production line, including not only printing but also inkjet varnishing and tactile effects, metalizing/foiling and laser die-cutting. We are still some way from that, but the future trajectory of machine development is clear.

Hybrid presses are a step towards this 'lights out' press concept, and there were fascinating discussions about when it does – and does not – currently make sense to invest in digital print stations combined with manually-changed flexo, decoration and converting stations. Certainly a combination of increasing inkjet speed and print quality, fast change semi-rotary dies and increased flexo unit automation is helping make the hybrid proposition more streamlined and attractive.

Digital embellishment is rapidly establishing itself as a viable technology, and discussions ranged over both the advantages and challenges to be overcome. For example, tactile in-line inkjet varnishes are not anywhere near the high build achievable with a screen unit, so this is one area where hybrid remains the only option. But the ability to follow variable print with variable decorative effects such as spot varnishes and foils greatly expands the options open to designers.

Transform

Big Data was a key subject for discussion, with a unique intervention by industry visionary Federico d'Annunzio looking at

“d'Annunzio argues that brands will increasingly demand full transparency into every aspect of the printer's operation”

how vast increases in computing power and networking speeds will transform not only the internal print factory, but also relationships with key outside stakeholders like global brand customers. d'Annunzio argues that brands will increasingly demand full transparency into every aspect of the printer's operation.

The European panelists said so far they had not detected any such pressures from their customers, so it will be fascinating to see whether this develops as d'Annunzio foresees.

Within the print plant there are still major blockages to the free flow of data, particularly the closed operating systems of today's conventional narrow and mid-web presses (MPS is the current exception). This means presses are unable to upload data or return production data in real time to factory management systems. Press automation, no matter how advanced, remains an 'island' in the connected factory.

Related to the Big Data discussion was data security. If we are now increasingly running our machinery through Industry 4.0 automated systems and exchanging high value files rather than physical artwork with branded goods customers, how can we guarantee the security of that data against malicious attacks? Answers might include blockchain and the sheer encryption power of future computing technologies like quantum computers.

Turning to what sort of skills the industry will require from the next generation of young workers, there was broad agreement that the trend towards digitization provides the industry with the chance to reinvent itself as a dynamic, tech-driven career path. There will simply be fewer and fewer operations involving heavy lifting and 'industrial' high noise or dirty environments, and more concentration on data handling and workflow.

Interestingly however, the young panelist in the US, still at print college, said what attracted her and fellow students to the industry was the chance to earn good money with good benefits in a safe and growing sector of employment, suggesting this might be a great message to get out to schools and colleges.



Label Congress conference recordings are available to Label Academy subscribers at www.labelsandlabeling.com/label-academy, while the Finat webinars are available to association members at www.finat.com

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Starts control

No improvement project should start without a firm charter defining its focus, writes Paul Brauss

It was great to see people returning to trade shows by attending Label Congress 2021 in Chicago. The event proved to be a great kick-off to the trade show season. I was able to visit with converters and found them eager to jump-start improvement projects previously held up by supply chain distractions and activity from Covid response. These leaders reported starting journeys of continuous improvement, but were troubled because their efforts stalled after a month or two. Their management teams hit a wall, grinding projected improvements to a stop and failing to achieve planned improvement due to the weight of changing priorities and resource constraints.

The desire by these leaders to implement improvement projects across their companies has never been greater. My friends told me their teams have serious problems managing improvement project priorities due to distractions from raw material supplier reschedules, employee attendance, internal process inconsistencies, and conflicting resource demands.

I explained that many business leaders have no problem starting projects. They all share the same problem: an inability to complete them. Complaints included a long list of projects and a lack of available resources to assign to the tasks. I acknowledged this as a common problem, and then told a story. I had just returned from a facility in Illinois where the need for focus on improvement is prevalent. The same with a facility in Missouri, Pennsylvania, Arizona and California. Pick any one and the situation is the same. I explained one facility had 37 improvement initiatives underway, not counting the 17 requests for IT to modify information reports from their ERP systems. In one example, the IT group complained that each week requests for report modifications were growing significantly. The new requests forced weekly reprioritizing and a growing backlog of requests. IT groups feel the stress of starting new projects more than many departments, as managers look for their ERP systems to provide solutions to many problems. The complaint in production departments, development departments and IT departments is always about not being allowed to finish actions before having to shift to another priority.

Prioritization

The art and science of prioritization are not new. In my executive coaching sessions, I ask the leadership teams to understand if time is of the essence, then time needs to be treated as a driving metric to performance. If we want to see projects completed in a timely

$$DCT = AIP's/Outs$$

$$\text{Dynamic Cycle Time} = \frac{\text{Actions in process}}{\text{capacity output}}$$

Dynamic cycle time equation

“It was great to see people returning to trade shows by attending Label Congress 2021 in Chicago”

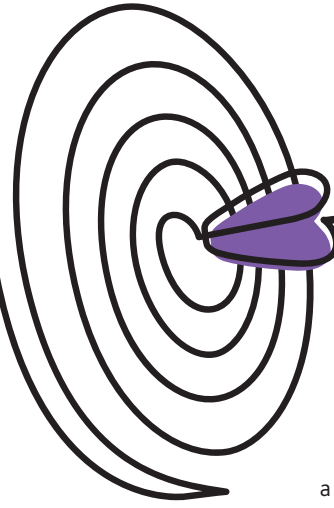
fashion, we have to understand a straightforward mathematical approach to how many projects should start.

Most of the leaders remind me that they hate math, so I keep it simple. The dynamic cycle time (DCT) is a result of a collection of all the active improvement projects (AIPs) versus the resource set (capacity) defined to complete those projects. I ask the leaders to understand a couple of premises and insist they keep an open mind. First, project resources are not always finite. Second, if we can reduce the numerator (number of active projects) and hold the denominator (resource set) steady, we will see the cycle time of the project reduced. If we can consolidate resources by backlogging a project for later, we can take resources from the backlogged projects and dramatically improve the time to completion. The concept is not new, but many leaders lose sight of the discipline to control 'starts', not realizing the impact on the cycle time of the projects. The simple equation gets their attention.

Part of the issue is that the projects lack definition. This uncertainty leads to an unwillingness to commit resources for fear the activity will be a constant time drain and not provide the anticipated benefit. The change to this thought process begins by drafting a project scope statement so that a team understands there are limits to their focus. I call this written statement 'the charter'. In IT departments and product development groups, the charter is called a 'statement of work'. At a high level, the leadership team manages how many of these projects get started and assigns a heavier concentration of resources with a limited time to completion. This is also easily applied to a company using kaizen and can be applied throughout the departments.

After reviewing a company's list of active or soon-to-be-active projects, I suggest leaders place all projects on hold. I coach executive teams to build a charter of the most critically needed projects immediately and backlog all the rest. The backlog list should be maintained visually and should include active and completed projects as well. If a clear charter cannot be defined, then the projects will die of their weight – perhaps leading to a simplification of the demand. Just listing them can lead to a discussion of the potential impact and degree of difficulty of the projects being proposed. I suggest working on a mixture of easy and difficult problems, but limit the scope of the task for quicker

“Leadership commitment to continuous improvement provides an immediate competitive advantage”



advancement and recognize success. Using these methods, most companies quickly recognize they have too many projects started without crisp definition of focus and completion expectations. I encourage leadership teams to activate no more than three projects for each macro business process, and only activate another when one of the previous projects is completed. No kaizen event or improvement project should begin without a firm charter defining the focus. Companies that understand this process assign resources more definitively. This leads to working on fewer projects, with better-equipped people driving a quicker response time. With this focus, you not only recognize faster completion of projects and great progress to the stated objectives, but also have highly satisfied teams.

Respecting time

Building on a reduced active list, we can now focus our project charters with details that are often overlooked. A charter identifies who will take responsibility for the implementation of the project and is used to set expectations including a start date and expected completion date. It requires planning and thought to avoid a false

start and wasting time. A time focus is critical to the success of all continuous improvement initiatives. Sticking to the use of the structural tools being discussed also leads to supporting a philosophy that acknowledges respect for people’s time. Several

reports speak to the reasons employees leave companies, and we’ve also seen reports about companies’ inability to find good people. With our continuous improvement disciplines, we acknowledge that good people are already working in your company. We work to involve these people purposefully and in measured ways to solve both problems of constraint and employee’s involvement. The current employees provide expertise at every level of the organization and engaging them for their knowledge of the process emphasizes their importance. This just does not happen automatically and the charter provides communication for a team to build consensus and rally commitment. It also demonstrates involvement, leading to buy-in, and stimulates conversations around improvement initiatives.

It is exciting to start a chartered improvement project in one area of a company and see how it resonates in other departments. Recently I completed a 5S project in one press work cell. When I

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returned to the facility the next day, two other cell leaders had already reviewed the charter, developed an action plan, and wanted input on what to focus on so they could improve their cell as well. The goals clearly understood and focused on time, and drove a contagious behavior change. I believe the discipline and focus was something the employees were craving as part of their workday. The common link was a smaller defined project with known success. An outcome was the opportunity to demonstrate respect for the operator's knowledge, time and work.

Pushing the concept, executing a project properly requires a leader to gain input from his improvement team, and together they complete the definition of what the future state looks like as a result of the project being implemented. Being visual with these efforts provides communication, expectations and identification of results within the group. Every team performs better with defined expectations. The company leadership, including team leaders, must have enough emotional intelligence to understand that a team member is providing their expertise and extra time solving a problem and this garners respect.

Diving deeper into the details of project management we increase visibility to accomplishment by noting the actions needed, the responsible person, and expected completion timeline. This commitment is captured in the form of a dot matrix or 3W (who, what, when) action plan. In a visual factory, this is usually a dot matrix format about the size of an easel pad. This visual commitment demonstrates to the rest of the team not only a commitment to the action but a commitment from team members to their team. Completing the tasks demonstrates respect for the team's time. No one wants to miss a commitment date when it means it will hold up progress to other actions.

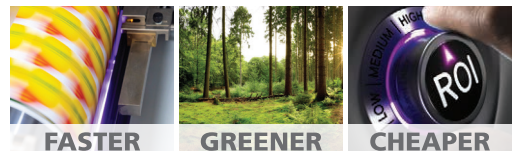
“Leadership commitment to continuous improvement provides an immediate competitive advantage”

The ability to demonstrate closed actions in support of a team provides a sense of accomplishment that is also infectious. This is the genesis of positive momentum and drives new conversation and commitment from within. This is how companies drive involvement, creating a positive culture that resonates with their employees. I can promise a significant increase in the number of projects completed without hiring new employees. The talent is within your walls today, and the leadership team focused on a culture of excellence will find a windfall of capability that will drive competitiveness by reducing response time, eliminating quality bottlenecks, resolving the old issue, and elimination of process waste will yield reduced cycle times. Leadership commitment to continuous improvement provides an immediate competitive advantage in an environment that fosters a winning feeling. Your employees go to work knowing they are recognized for their contribution to positive results. Winning in this environment is fun.



Paul Brauss, former CEO of Mark Andy and a past board member of TLMI, is a consultant and executive coach. See Braussconsulting.com, and buy his book at amzn.to/2NFzXkB

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Packaging in a pandemic paradigm

The role of packaging has only grown in importance during the pandemic, writes Vicki Strull

How many ways has your life changed during the pandemic? For me, a short list includes how I work, shop, travel, celebrate, mourn, gather with others – not to mention the health, safety and school decisions for my kids. Like you, the changes I've experienced are numerous, in both my personal and professional world. As a design strategist specializing in packaging, I have been considering how – or if – the role of packaging has changed in the Pandemic Paradigm. And I've come to this conclusion: even within a Pandemic Paradigm, I believe the primary role of packaging has not changed.

“Your packaging doesn't get a second chance to make a first impression”

From a marketing and design perspective, packaging's job in the customer's journey remains the same: to encourage the shopper to touch a product, pick it up and put it in their cart – whether during an in-person experience (taking it off the shelf at a store) or during an e-commerce experience (selecting it online from a line-up of products). Either way, the packaging sparks a sale. As for the multitude of other roles of packaging, those also remain the same: to protect a product during shipping; to educate, inform and engage consumers; and to extend and align with the brand's story, mission and values.

However, what has changed is consumers' buying behavior. Globally, we're still not going into stores as often, and we're continuing to shop online more frequently than we did pre-pandemic. Importantly, brand loyalty has taken a dip and consumers' sense of trust has been shaken.

So while packaging's role has not changed, its need to support these shifts in consumer behavior has. As packaging designers, marketers and converters, we have three immediate strategies to lean into these behavioral shifts with our packaging: leverage the trustworthiness of packaging as a physical touchpoint; step up personalization; and ensure packaging is shareworthy.

1: Physical touchpoints

If you've seen me speak or read my articles or followed me on social media over the years, then you've heard me say that packaging is a brand's most important touchpoint. While that declaration sounds simple, its meaning runs deep and has many layers. In addition to the sensory impact and its effect on our emotional connections and memories, physically touching an item that is an extension of a brand – such as packaging – also increases our trust in that brand.

According to research, physical touch helps create a connection between consumers and the product they're holding. Physically touching a product creates a sense of psychological ownership, and even drives up the value of the object we are holding. That phenomenon is called The Endowment Effect.

Studies reveal that tactile elements, weight and firmness also influence the way we assess the quality of the product, and that assessment transfers to the brand itself. Understanding the impact of physical touchpoints is essential to connecting with shoppers in today's new paradigm.

Further, physical touchpoints are a way to cut through the

online noise. Recent reports from the United States Postal Service (USPS) highlight the physical touchpoint of direct mail, particularly at a time when going to the mailbox was the high point of our day! USPS reports that '92 percent of consumers said they prefer relying on direct mail for making shopping decisions, and 67 percent said they feel mail provides a more personal connection than the internet.' Many retailers and fashion labels launched highly-successful 'lockdown' catalogs, with unprecedented ROIs and sales.

The opportunity goes beyond direct mail, magazines, and catalogs, of course; the packaging itself and the materials inside the package are physical touchpoints and create an emotional connection with consumers at a time when their only physical encounter with a brand may be the packaging.

Brands are beginning to embrace the value in physical touchpoints that they may not have recognized before the pandemic. As the pandemic spurred a surge in virtual events, we also saw a rise in the physical swag bags and custom kits, mailed to attendees who tuned in online. For example, when Bloomingdale's hosted a virtual Jimmy Choo event, customers who signed up early received an exclusive kit that held a complimentary cocktail and macarons to enjoy during the livestream. In addition, the first 50 people who purchased a pair of Jimmy Choo shoes received a limited-edition fashion sketch that became a keepsake. The added physical touchpoints helped attendees feel more emotionally connected to the brand, as well as to each other, creating that all-important sense of community.

From online industry conferences to business webinars, graduations, weddings and more, kits and keepsakes bring a connecting, physical element to a virtual experience.

Consumers' brand trust has also declined during the pandemic. However, research reveals that a physical touchpoint can increase trust because it's real; consumers can feel it, see it, hold it. When you buy a product online, for example, you have an expectation of that product based on the image, description, reviews and other details. But if the item arrives on your doorstep and the packaging doesn't meet your expectations, you're deflated, disappointed and you just lost your trust in the brand.

Your packaging doesn't get a second chance to make a first impression. For many shoppers, a product's packaging is their first or only physical touchpoint of that brand. It absolutely has to match expectations and make consumers feel confident and excited about their purchase. In other words, the right packaging rewards the consumer.

In a Pandemic Paradigm, when receiving a box on our doorstep might be the highlight of our day, packaging provides new opportunities to build consumer trust, connection and brand loyalty. Many brands are adding materials inside the package, such as samples, a personalized thank you, and instructions for sharing on social. These are strategies that brands can leverage as e-commerce remains strong.

And while we may be seeing a pendulum-swing back to the importance of physical connection, I'm not talking about an either/or model. It's not a choice between online marketing or physical engagement; rather, it's a holistic strategy for marketing and design, taking into account how online and physical touchpoints complement each other to drive a brand's consumer engagement, loyalty and revenue goals. The power is in the integration and combination.



“While packaging’s role has not changed, its need to support these shifts in consumer behavior has”

2: Personalization

Brands are continuing to recognize the correlation between personalization and consumer loyalty. Simply put, we feel a stronger connection when products are personalized or customized. That doesn’t just mean having your name on something. With AI, retail tracking, search data and other methods, brands can analyze purchasing patterns and create customized experiences as well as tailor products to specific audiences and communities.

For example, when Harney & Sons Fine Teas delivers customers’ orders, tucked inside the package are samples of other teas the consumer might like, based on their current or previous shopping. It just makes sense, doesn’t it? We experience personalization and customization throughout our brand experiences, so why not in our packaging and point of purchase? I see it as an extension of what brands are already doing in personalized online marketing, with unique landing pages, recommendation engines, and all those targeted ads that show up in our feed.

Another example is PepsiCo’s Mountain Dew brand, which created limited-edition bottle labels representing all 50 states. The brand’s ‘DewNited States’ campaign was a chance to make its messaging personal to consumers, developing more than 400 physical and digital marketing assets customized to each state. Mountain Dew then extended its campaign into its point of purchase materials, and offered a 100 USD gift card to those who collected all 50 labels.

Personalization like this not only helps consumers feel connected to a brand or community, it builds brand loyalty and drives sales, giving brands a competitive advantage.

3: Shareworthiness

So if you trust something and feel connected to it in a personal way, you want to show it off and share it with others, right? Right. All you have to do is look at the billions (yes, with a ‘b’) of brands, influencers and everyday consumers sharing product posts and videos across YouTube, Facebook, Instagram, TikTok and more.

This is another unique aspect of the Pandemic Paradigm, as social media use and views increased beyond expectations. TikTok usage grew 800 percent from its pre-pandemic days; Instagram saw the number of brands using live broadcasts and Stories increase five times in 2020.

A product’s packaging has a significant influence on shareworthiness. The unboxing experience has become a popular and highly-anticipated subject of consumers’ shared videos. When you consider the roles of packaging that I listed earlier, I’d say now there is an additional goal: to make sure it’s shareworthy.

It’s important for brands to look at packaging and its shareworthiness from an ROI standpoint. If I’m sharing my delight in a product and its packaging, the ROI of my purchase and my value as a customer just went up. I’m endorsing a product and my friends and followers trust me. In fact, research shows that friends trust another friend’s recommendation more than they trust a celebrity, a paid influencer or the brand itself. The outcome? A brand may get more customers simply because of its product’s fabulous packaging.

When brands look at that from a financial perspective, there should be a metric in place to measure a packages’ shareworthiness. How many views did it get? How many shares did it have? If brands have that metric, they can connect it with the ROI of the package design and materials, and it starts to affect what they put into and onto the packaging: how they print it, coat it, and finish it; and what substrates they specify.

As I’ve pondered the role of packaging in a Pandemic Paradigm, do I still think the role of packaging hasn’t changed? I do. And yet, these three strategies show that packaging’s role has grown in importance, with new opportunities to connect with and engage consumers; build trust and loyalty; and of course, to influence buying decisions and drive sales. We will continue to see how brands, designers, marketers and converters respond to these opportunities, knowing that one thing remains constant: packaging is still a brand’s most important touchpoint.



Vicki Strull is a packaging designer, strategist and speaker who advises top-tier and emerging brands on how to leverage the power of print and packaging within their omnichannel marketing strategies. Join fellow trendsetters at [vickistrull.com](https://www.vickistrull.com) or follow Vicki on LinkedIn @vickistrull

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Harness the label industry's top drivers

M&A and equipment investment are now imperatives, writes Bob Cronin of The Open Approach



If there's anything we've learned over the last 18 months, it's that we need to be adaptable. Still shaken by Covid-19, our customers are making product (and correlated label purchasing) decisions with caution. Changing expectations and regulations have disrupted manufacturing, and shortages in raw materials and labor are causing huge problems in supply chains. Add to that, many businesses are scrambling to meet demand for items they never had to worry about before.

Customers want partners that offer them confidence that they're not getting elsewhere. Confidence that you can manage whatever they need in a timely (and budget-conscious) fashion. And confidence that you can manufacture the printed materials that can help them grow.

Savvy label and packaging entrepreneurs are embracing two major trends to stay ahead of the game: investing in new equipment platforms and forging mergers, acquisitions and alliances. Though both activities have always been available growth strategies, they are now imperatives. Yet, these actions are costly and have no guarantees. They need to be orchestrated wisely to ensure you attain your objectives.

Equipment and technological investments

I've always said buying equipment isn't a strategy but how you utilize it is. What I mean by that is if success were based only on who has the latest and greatest equipment, then the players with the most cash should win. Look at the market, and you can see that's clearly not the case. It's the providers with the platform that best fits their customers (and prospects) that are always the leaders.

There are plenty of equipment salespeople talking you up on a 'good investment'. But carving out a CAPEX trajectory needs to be based on responding to the needs, issues and future of your loyal customers. Before you embark on a new idea, make sure it aligns with where your customers are going. More important, make sure it's one that ensures their growth as much as it does your own.

Many companies (and industries) are struggling with a multitude of issues right now. As label and packaging companies,

"If you stop preparing for change and evolving, you're preparing to die"

we're a key part of their brand. We have the unique opportunity to provide solutions that drive sales and help them surpass some of these pressures.

Bring your top 20-30 customers closer. Meet with their executives, purchasers, and sales and marketing leaders and discuss their goals. Companies that understand the needs and issues of their customers' markets are the winners. A word of caution, however, don't try to build your business around dying industries. Consider your 'top customers' wisely as you make your investments. Investigate their markets and do your due diligence. Make sure you believe in their arenas and possibilities ahead.

Additionally, as you plan your CAPEX, make sure it opens up new avenues for you as well. No matter how reliable your customers are, every great business is great because it continually forges new opportunities.

Merger, acquisitions and alliances

Larger, more diversified companies typically have an advantage. But being larger isn't a strategy. You must have a unique (and in-demand) capabilities base or platform to gain real advantage. With M&A being the quicker way to accomplish this, we're seeing increased activity from smaller and mid-sized players. This is happening enough that we're starting to see some new market giants emerging.

We've always described our industry as fragmented, and even after many years of consolidation, we remain so. Indeed, our \$9.6bn US label and packaging market and much larger global arena encompass numerous businesses providing for various portions of buyers' total needs. With the growing number of SKUs, reduction in shelf life, and changing regulatory content that must be present on the label/package, there's increasing demand for better solutions and more attractive

labels. Moreover, customers globally want the flexibility, efficiencies, savings and opportunities presented by digital. Thus, a digital branch is essential to compete. You must also have the ability and expertise to serve the needs of different vertical markets – especially those that are thriving in the current economy.

As you seek potential acquisitions or alliances, ask yourself these questions: If your top customers grow, what might you need to handle their increasing volumes? What label and packaging gaps exist in your regional areas, and how valuable are they if you can fill? E-commerce is considered one of the biggest opportunities for growth. What technologies/personnel/workflow systems do you need to manage these sales efficiently – and market your company for the greatest impact? Where are your seasonal downturns, and what capabilities/geographic reach do you need to adjust for these? And finally, do you have the structure, people and know-how to identify and penetrate new, profitable markets?

Take some time to evaluate and understand your business, the issues and needs of your customers, and your competitors. Can you reach your growth initiatives better by an equipment investment or by an M&A venture or strategic alliance? How can you accomplish these activities without becoming a victim of any new organization? These can be complex considerations. Gaining the perspective of an outside expert may be key to help you sort through your best options.

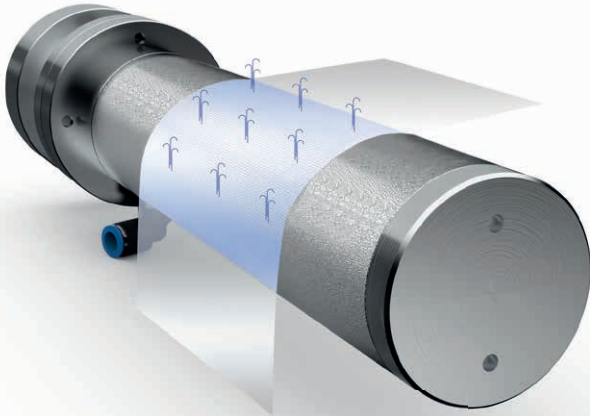
In the end, labels and packaging is no different than any other business. If you stop preparing for change and evolving, you're preparing to die. Let's plan on a long life and develop a plan not just to be seen as a vendor to your client base but rather as a partner to grow and succeed together.



Bob Cronin is managing partner of The Open Approach, an M&A firm focused exclusively on the world of print. To learn more, visit www.theopenapproach.net, email bobrcronin@aol.com, or call (+1) 630 323 9700

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Young managers – Charlotte and Arnie Ellison

Siblings Charlotte and Arnie Ellison, commercial director and business development director at OPM Group respectively, discuss their journeys in the label industry. Interview by Jordan Hart

ArnArnie: I joined after Charlotte about nine years ago. It started as a summer job; I was a temp to earn some extra pocket money. I did jobs like sweeping the car park, filing, and answering the phones. I was 18 or 19 years old and really enjoyed being around the team and getting involved in the business day to day. I took business studies at school, so I was interested in that anyway. About a year in we had a conversation, a bit in jest with the family, and I mentioned wanting to do some sales with the business. My first experience with that was at a trade show in London, and I really enjoyed it. I fell into sales that way and then progressed from there.

Charlotte: My story is quite similar. I also started with the business in a temporary role in our finishing department. I was then given the opportunity to really get involved in the business and see where that might take me. That was achieved through external study and joining each of the departments in the business until I landed in our customer facing team. I joined in 2010 and about five or six years ago I took on managing our customer facing team, which includes the customer service, studio, and estimating teams. I had an excellent experience and opportunity to gain that knowledge and have fun along the way.

Arnie: It is such an amazing industry and there are a lot of good people in it as well. We have been fortunate to meet a lot of good people early on in our careers. Charlotte and I went to a Finat Young Professionals Network (YPN) meeting (then called the Young Managers Club) seven or eight years ago. OPM is a member of Finat and we got involved with the Young Managers Club for the networking. We wanted to meet people and broaden our network and learn new ways of working. We wanted a whole industry picture, and we've met a lot of good people and made a lot of friends in the industry. It is really interesting to see how different cultures and different countries operate. Just in the UK, it is different to how the US would work or the rest of Europe.

Charlotte: It is a really excellent support and knowledge sharing network. We have met a lot of good people we have been able to share experiences and ideas with. Our most recent involvement has been on the board of the YPN. We are trying to help take the YPN forward and attract new young talent. For our industry, attracting young talent, harnessing new skills and working towards Industry 4.0 and greater sustainability is extremely important. Packaging and labels are sitting at the forefront of those changes and it's going to be key to get people onboard who want to continue to make a difference.

Arnie: The sustainability aspect is crucial. For me, working day to day with clients and brands, it's a major focus right now. With every single client the first question is 'is it recyclable? Is it sustainable? What are the green credentials?' It is such a massive part of what we are doing right now and I can only see it getting more prevalent in the industry. It is really exciting because there are some really interesting products out there and some fantastic projects that are kicking off and a lot of it stems from sustainability and having the next generation working on those things is pretty cool.

We are looking to educate our customers as much as we can about sustainability. It is really easy to greenwash, and there is a lot of that out there. If that is done too much, it leads to a lot of waste.



Siblings Charlotte and Arnie Ellison, commercial director and business development director at UK-based converter OPM Group

“We work with brands who are really passionate, and we share that passion with them”

If the materials aren't right for the products inside them, then that is more detrimental to the environment than it is having plastic packaging which is unrecyclable.

We are focusing on bringing new talent in and really understanding that the younger generation are the ones who are going to make a difference. It is difficult to get the younger generation into this industry, it just is, but we need to get across the message that sustainability will go one way. We need to be a part of effecting that change with new ideas and enthusiasm.

Charlotte: We want to be sustainable for the future, not just environmentally, but also in our workforce. One of the reasons I love my job is because we have such a wonderful workforce, and every day is different. It is wonderful to work with different brands, clients, and wish lists. Realizing somebody's idea into real life is quite exciting and seeing products out there that might have come from us in Leeds is pretty cool. I'm biased, but we have an excellent workforce and there are opportunities for all of us to grow. Every day is a school day, as they say, and it always keeps it interesting.

Arnie: I agree with Charlotte. My favorite part of my job is getting satisfaction from the customer. There is nothing better than doing a project with a customer and at the end of it they are really happy with it. We work with brands who are really passionate, and we share that passion with them. If you can help someone bring their dream to realization and see it in a shop, that's fantastic.



Watch L&L's Young managers video series at www.youtube.com/c/Labelsandlabeling78



Q&A

Cristian Reyes is general director of Mexican converter Mayapack. Founded in 2006, the company began digital printing in 2016. Since then, it has quadrupled in size and diversified into a wide range of label and wide-format products. Interview by James Quirk

L&L: How has the company evolved since its foundation?

Cristian Reyes: Mayapack was founded in 2006 by my family and me. We had no experience in label printing but saw that there were opportunities in the market in terms of service and quality. We installed a Mark Andy 830 flexo press. To begin with, we took on work for companies that other converters didn't want – because the runs were short, for example, or other reasons. One of our first jobs was printing the peelable lid for instant soups. It was complex work, with the lid needing to be thermosealed. We took on the challenge, and this really helped us to begin our exponential growth.

As we took on more work, we installed a second Mark Andy 830. Then we upgraded the two 830s to 2200s, and added an Edale FL3 flexo press. For the first ten years, we were a conventional printing company, but because we were getting so much short run work, we began to investigate digital printing. In 2016, we installed an HP Indigo digital press. It allowed us not only to serve our big clients with high quality short-run work, but also to elevate the brand image of our smaller customers so that their labels were of the same quality as the bigger brands. There are many examples of small companies who began to work with us and who have grown into important brands in their segment.

L&L: What does the company's production set-up look like today?

CR: Today we have two plants – one for flexo, which represents 60 percent of our business, and one for digital, which is 40 percent of the business. On the conventional side, alongside the Mark Andy and Edale flexo press, we run shrink sleeve equipment from Karville and finishing machinery from Prati. Eighty percent of our flexo work is producing self-adhesive labels, with some in-mold labels and some shrink sleeves.

On the digital side, running an HP Indigo 6800 and the HP Indigo 20000 installed in 2019, 80 percent of what we produce is in-mold labels, with shrink sleeves the next biggest area. We also run converting equipment from Brotech.

The next step, with the HP Indigo 20000, will be to produce flexible packaging.

L&L: What has been the impact of digital printing on the business?

CR: Since the installation of the first HP Indigo press in 2016, the company has quadrupled in size. It has been an exponential change for our company.

In Mexico, the economy is largely driven by small and medium sized businesses, who often don't have a large agency helping them to launch a brand into the market.



Mayapack installed an HP Indigo 20000 digital press in 2019

“Our business is very digitalized, very automated, so yes we do cultivate an atmosphere of a digital start-up and that culture is present in our staff and also in the way our offices are decorated”



Mayapack's offices in Toluca, Mexico, look more like a tech start-up than a label printing company

So as well as the HP Indigo 6800, we also installed an HP Indigo Latex press for wide format work. We started our own in-house creative department, and began to use our digital technology to offer our clients not only labels – which we could design for them ourselves if needed – but any kind of printed product they wanted: marketing materials, special promotions, branding and decoration for their offices, etc. This was only possible because of digital technology. Digital allows easy production of samples and mock-ups, which helps the creative process.

So digital wasn't just the addition of a complementary process for Mayapack, but the creation of whole new areas of business. Indeed, for us, flexo is now a complement to digital, rather than the other way around. The

biggest headache for a client is their short runs, not their long runs.

L&L: And the additional of digital also saw you move into in-mold label production.

CR: We started producing in-mold labels in 2016, with the HP Indigo press, which was another great point of diversification. Yupo, who supplied us with the materials, was a great help to us. Within two years, in-mold labels were 50 percent of our production.

People are often afraid of entering in-mold. It is perceived as complicated. But the technology has improved a great deal in recent years. The truth is, it's not very complicated. For clients, costs are competitive compared to offset. And there

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The Mayapack team in Toluca, Mexico

About Mayapack

Founded in 2006 in Toluca, an hour's drive west of Mexico City, Mayapack operates two plants totaling 2,500 sqm and has a staff of 110 people. It produces self-adhesive, in-mold and shrink sleeve labels for a variety of sectors, including home and personal care, cosmetics, lubricants and specialty chemicals, electronics, food and beverage. Also among its portfolio are security labels, foil and special effects, water/oil/chemical resistant labels, and extended-content and peelable labels.

Beyond labels, it produces promotional materials for marketing and events, and decoration for homes and offices. Since 2017 it has operated an in-house design department.



Mayapack mainly produces self-adhesive, in-mold and shrink sleeve labels

“Since the installation of the first HP Indigo press in 2016, the company has quadrupled in size”

is the sustainability aspect: the lack of adhesive means that in-mold labels are easily recycled. This and the quality are key arguments we use to convince clients to switch from self-adhesive.

The key markets for our in-mold labels are lubricants and promotional work. We can offer quick turnaround, which is particularly important for promotional labels. And we are known for our quality, so these have been advantages.

L&L: How have you integrated your digital production into the company's workflow?

CR: If the first revolution in the company was the additional of digital, the second was our installation of a Label Traxx MIS in 2019.

Our growth had been so fast that it was difficult to stay on top of all the information surrounding each job. The way we were costing our work made it difficult to know exactly how profitable each job was. The Label Traxx software allows us to see all the information from every facet of our production in real time and to know the exact cost of producing each job. It gives us control over all the data from every area of the business and helps us to make informed decisions.

Immediately upon installing the system, we could see that some of our jobs were less profitable than others, and that some were quite inefficient in terms of not using our production equipment to its full capacity. The cost analysis and business metrics modules were particularly useful in this area. We were able to improve the efficiency of our production.

Part of the appeal of the Label Traxx system is that it is specifically designed with

flexo converters in mind, but also for digital. The system's evolution from flexo towards digital matches our own. Label Traxx adapts itself very well for both technologies.

Since we installed Label Traxx system, we have entered 70 percent more orders, or tickets. The speed of generating tickets for our digital presses has risen by 90 percent. With digital printing, you can group different jobs together quite effectively and print them at the same time. So we are much more efficient.

We can also measure with much more precision the downtime involved with every production order. We've reduced that downtime to just 3 percent of what it was prior to installing the system.

And we have reduced our delivery times by 50 percent, just thanks to improved administration.

Mayapack would not be doing what we are doing at the moment without the combination of these technologies: HP Indigo digital presses and Label Traxx MIS.

L&L: Do you have plans for further investment in new technology in the near future?

CR: The main focus now is to complement our existing technology. For example, we might invest in more finishing equipment to allow different kinds of embellishment. And there might be some investment to aid our move into flexible packaging production.

L&L: Do you envisage expanding your business abroad?

CR: Yes, but I see it a little differently to the usual model of creating a global network of printing plants through expansion or acquisition. I see it taking place through



Mayapack has quadrupled in size in the five years since it began digital printing

“For clients, the cost of in-mold label is competitive compared to offset. And there is the sustainability aspect: the lack of adhesive means that in-mold labels are easily recycled. This and the quality are key arguments we use to convince clients to switch from self-adhesive”

a digital platform – sending products on-demand, directly to consumers around the world. Or it could happen through a partnership with a company abroad, to whom we send an order to be printed locally, for example. So more of a digital version of expansion.

At the moment, less than five percent of our production is exported, mainly to Central America and the Caribbean.

L&L: What initiatives has the company undertaken to improve the environmental sustainability of its production?

CR: We are conscious that label printers produce a lot of waste. So we are very committed to caring for the environment. We are developing a full eco-friendly program, involving all parts of the company, to help us reduce waste and energy consumption, and use sustainable materials.

We offer our clients products that are certified as being environmentally friendly. All our waste is collected, and instead of selling it on we donate it to an association which recycles it. It is one of the advantages of producing in-mold labels, which are an important and growing part of the business. They can be recycled and reused.

L&L: What has been the impact of the pandemic on Mayapack over the past 18 months?

CR: The first priority was the well-being of our staff. Health is not negotiable. Everyone who did not have to be in the plant moved to working from home. This is still the case, and will continue in the future. We have a young workforce who are technology-savvy and were able to adapt quickly and efficiently to remote working.

In terms of business and production, the company has grown during the pandemic. We have had some clients stop ordering from us, order less or go out of business, unfortunately. But two of our biggest end-user markets are home and personal care, brands which produce cleaning products, sanitizer gel etc, and orders from these companies grew a great deal. Our strategy of producing a diverse product range for a wide variety of markets helped us. Fortunately, we were able to not only keep all our staff, but add new employees.

L&L: Mayapack’s offices look more like a tech start-up than an ink-stained printing plant. You mentioned that your workforce is young. How would you describe Mayapack’s culture?

CR: I’m 39, so I was quite young when we started the business in 2006. It’s easy for me to relate to the younger generations and put myself in their shoes. Among our administrative staff, the average age is under 30. Some of our creative team are just 20 or 21. What’s important is empathy in leadership, so you help to create in your team a strong emotional bond with the work they are doing. Employees are productive because they are happy. This is what we are always looking for. We are all friends.

We have a human resources department that focuses on the emotional and physical health of our employees, and meeting their needs with empathy. We create career plans so our staff understand where they are and where they can be in the future. This provides them with a level of security and certainty.

Most of our leadership roles are filled by people who have been promoted from within Mayapack. We have recruited externally for certain strategic roles, but only in very specific cases. So the development of our staff is a hugely important part of my management.

It can be difficult to attract young people into the label industry. There is sometimes a certain stigma attached to manufacturing, and there is a perception that our industry is all about tools and machines. But the reality is that our business is very digitalized, very automated, so yes we do cultivate an atmosphere of a digital start-up and that culture is present in our staff and also in the way our offices are decorated.

We know that our main asset is our people, and so everything we do is as a consequence of that.



See mayapack.com.mx for more information

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Predictions 2022

Industry experts on how to navigate the road ahead

Mike Fairley, strategic consultant, Labels & Labeling

After almost two years of restrictions and lockdowns it appears that much of the world is at last beginning to experience a period of growth. However this growth looks to be coming with a number of challenges which will most likely have a key impact on the label industry's performance, profitability and investment decisions over the coming year.

Already being experienced are rising costs – in materials, energy, labor, shipping and distribution. This in turn will put pressure on converters to try to increase their prices. This will not be easy as buyers will probably be looking to contain or even reduce the price they pay for their labels. No doubt the industry will be in for some interesting discussions on this with customers. It's worth thinking how the converter can better add value so as to justify any increases.

“Look to enhance recruitment, training and particularly job retention to ensure that employees are not tempted to move to a competitor or even another industry”

To combat rising costs converters should also look at how they can improve production efficiency and flexibility, enhance workflow automation, reduce downtime and minimize wastage. This may mean further investment in MIS, in advanced web inspection and control systems, as well as faster and wider flexo or digital presses.

If the experience of other industries coming out of lockdown is anything to go by then the label industry may be faced with labor and skills shortages in the coming year. Look to enhance recruitment, training and, particularly, job retention to ensure that employees are not tempted to move to a competitor or even another industry.

Finally, the label industry should expect to see increasing pressures from governments, brand owners and pressure groups on just about everything that can be placed at the door of 'climate change', whether this is environmental issues, energy consumption, factory heating, carbon reduction, the use of sustainable materials, minimizing waste and increasing recycling, and rising pressures on the use of plastics.

Ideally, companies should appoint a member of the management team to look at each of these four key areas – cost reduction, efficiency and automation, recruitment and training, and climate change and the environment – and make recommendations for implementation and growth.

Bob Cronin, managing partner, The Open Approach

This past year was quite favorable for labels and packaging, but entrepreneurs must navigate 2022 dynamics to stay ahead. First, consolidation will continue, and may speed up as investors – especially private equity – seek to dominate in our highly fragmented industry. Larger geographic footprints will be essential to avert material shortages and supply chain issues which will likely accelerate as more laborers leave in the 'great resignation'. Smart companies will expand warehousing/inventory and extend supplier networks. Some will begin producing their own stocks to avoid price and availability issues.

Customers are still adjusting/rebuilding from Covid-19 and will seek new partners who can offer more capabilities — and more confidence that they can get their products without delay.

This spells out great opportunity for 2022. Strong marketing, prospecting and follow-through are imperative. And initiatives to

retain your existing base shouldn't be missed. Your top customers may be the ones mentioned above. Many companies will gain ground through strategic partnerships, alliances, and perhaps an M&A venture. This spirit of the marketplace is still a little shaky. Make the moves to give your customers more control and assurances. With proper adjustments, you'll be positioning your company for 2022 and beyond.

Vicki Strull, brand strategist, Vicki Strull Design

Sustainability will continue to evolve – not as a trend, but as a true change in corporate mindset. It must become intrinsic to the brand itself; part of its DNA. Not just because consumers care about it, but because brands are taking responsibility for the sustainability of every aspect of their business. And by the way, sustainability won't just be about the environment; the mindset will expand to include a sustainable workforce, fair trade and fair labor practices.

Another development we'll see regards how brands will lure consumers back to retail stores, since all of us have become so comfortable ordering online. I see this as an opportunity for point-of-purchase and packaging to embrace the combination of experience and convenience in the store – what I'm calling 'experiential retail'.

It might be through QR codes, for example; maybe you scan for more information about the product, or to self-checkout, or to see an inventory or get fashion tips. It's an opportunity for converters to use what they already know about engaging print to help brands connect; that is, they already know how to make packaging experiential with shapes, haptics and special effects, to name a few. Experiences are going to lure people back to retail stores, not transactions.

Jeroen Diderich, vice president and general manager for label and graphic materials, North America, Avery Dennison

The past 18 months have certainly tested the resilience of our industry. From the global pandemic to raw materials shortages, cost inflation and increased demand, we have seen the importance of a strong value chain.

In addition to investing in a more resilient supply chain, we are also focusing on innovation and sustainability. The importance of sustainability to consumers will continue to gain momentum in 2022. Through our continued focus on advancing circularity, brands and converters will have an even broader range of labeling solutions to meet their sustainability goals and new regulations.

As we look to next year, we believe that health and wellness trends will continue to drive new product growth along with ecommerce and consumer desire for convenience.

Will Mercer, R&D director for graphics, label and board, Coveris

Sustainability will be the number one driver of label trends in 2022. This will include preparation for deposit return schemes (Scotland in 2022, England in 2024) in the beverage category through separable, wash-off label options to aid material recovery of PET bottles. I expect increased use of wash-off labels in non-beverage applications, such as PET trays, to reduce contamination in recycling process and improve material recovery.

The shift to monomaterial PP and PE plastic substrates as secondary label materials for application onto PE or PP primary packaging will continue to support monomaterial recycling and full packaging recovery, as well as increased demand for thinner materials that are sustainably sourced. With retailers looking to measure carbon assessment down to a product level in the future, demand for lighter, more resource efficient materials with extended traceability will increase.

I think we will see increased recovery of materials through new infrastructure – including Coveris' own award-winning label recycling center.

“The label industry may be faced with labor and skills shortages in the coming year”

Driven by lightweight packaging benefits as well as industry-wide cartonboard material shortages, linerless labeling might become a replacement for cardboard sleeves. Due to its fully automated application, it also offers major operational efficiencies in combination with reduced inputs to combat current labor shortages.

As brands continue to fight for shelf space, innovative embellishments that deliver a real point of difference through premiumization will be of value. Having recently invested in a Kurz DM-Jetliner at our Amberley Blandford site, we are now able to offer next generation Digital Metal in-line foiling to create custom and multiple color varieties within a single label, as well as delivering major sustainable benefits achieved via reduced originations and metallic rationalization.

Supporting the same needs as outlined above, new personalized and interactive enabling technologies will take labeling to the next level. I also expect hybrid print technology, combining the benefits of conventional UV flexo together with digital capability, to achieve economies required and deliver technological advancements.

Al Spendlow, director, A B Graphic International

Automation will be a continued trend for 2022. With increased demand, you either need twice as many machines or machines with twice the production, and automation is the way to achieve that.

Geert Van Damme, managing director, Cerm

We will still have to live with Covid and its aftermath in the coming years. The virus did not disappear, some supply chains only recover slowly and some products will remain scarce for a while.

We've discovered how to do business remotely, so we will probably keep on meeting and training online. But the interpersonal 'touch' disappeared, and we all miss this. So business has changed, but we do not know yet what the new guidelines are. Instead of reaching out our hand as a spontaneous 'nice to meet you' gesture, we now carefully ask whether it is allowed. But some lessons learned will lead to interesting decisions. Our workflow tools, for example, were not ill and did not have capacity issues.

Many converters will invest in workflow and automation software in 2022, just as we've all changed from desktops to laptops and from phones to headsets.

Bruce Hanson, CEO, AWT Labels & Packaging

Sustainability stands out the most. Finding ways to bring better, more sustainable solutions forward. And that's both on the label and flexible packaging side of the industry. Whether its wash-away adhesives or other PET-type products, you're going to find a lot of companies trying to bring products that are better for the environment.

SKU proliferation is also a trend that's going to continue into 2022. The complexity and variety companies are looking to bring to market will remain and be a steady trend. Label converters are going to have to be able to support and meet the demands clients are looking for in terms of standing out on the shelves through the use of embellishments or other finishes.

Another thing that's going to be interesting to see is how companies are going to manage and control costs with the price increases that have been hitting the label and flexible packaging markets. Everyone, across all industries, is dealing with this right now.

Jakob Landberg, sales and marketing director, Nilpeter

2022 is going to be yet another surprising year, with unprecedented challenges. Our markets have been booming during/after Covid-19, but our industry-wide supply chain crisis is front page news.

Some parts of the world have handled Covid very well, while others (in Asia, Latin America, and certain enclaves in Europe) are still fighting. That will unfortunately continue well into 2022.

On a positive note, I do, however, expect the introduction of a lot of new technology – conventional, digital, IoT-based – pushed by price increases and very busy label markets. Workflow automation with focus on faster changeovers and minimal waste will pop up.

More automation is crucial if we want to attract new generations of operators and managers into our industry. There is a global need for 'young blood'. 2022 will also be another milestone for mergers and acquisitions. We're facing many inevitable generational changes without new generations to take over.

I believe we are fortunate to work in an innovative industry – with a vast combination of technologies, a global market, small product suppliers and enormous solutions-based providers. We are used to facing a multitude of challenges, and I for one am excited to come up with new solutions. Bring on 2022!

Cynthia Frost White, president and CEO, Channeled Resources Group

It's hard to put what is going to happen in 2022 into words. I doubt any of us forecast the crisis that happened due to Covid and supply constraints in 2020 and 2021. Twice in the last two weeks, I have heard that we have 16 to 18 more months of supply chain issues to look forward to. We have had three price increases from our paper suppliers in the past six months, and we expect one more in early January. I'm afraid until demand drops, that will not be the last increase. On top of that, labor and freight constraints will increase costs and lead times on materials for the inevitable future. We are repeating the rapid inflation of the 1970s. Worse, we cannot get certain chemicals, so supply is almost impossible in some product lines. This is not a fun prediction for 2022. Most of us had a tough 2020 with Covid headaches. 2021 has been very stressful due to prices and shortages. 2022 will not be much better.

Gene Dul, president, Schreiner MediPharm US

Prevalent trends in healthcare affecting pharma labeling will continue: e.g. supply chain integrity, patient centricity, digitalization, biotech drugs and sustainability. Labeling suppliers have to provide innovative customized solutions that are adapted to the specific application and packaging while addressing market trends and the special challenges they pose.

To support supply chain integrity and combat counterfeiting, customized security solutions have to be developed considering the threat scenario of a pharmaceutical manufacturer and the affected product, always keeping in mind the different stakeholders within the supply chain. Multi-level label-integrated security concepts, ideally combining analog and digital features, can help to support end-to-end supply chain integrity. When it comes to product integrity, regulations like the EU Falsified Medicine Directive hamper tampering with secondary packaging. However, this does not cover primary containers on unit level, e.g. vials and syringes. Here, novel solutions are required that can provide reliable tamper evidence and clear first-opening indication.

As regards patient centricity and growing self-medication, convenience and reliability of drug administration are crucial aspects. Smart labeling solutions with an integrated RFID or NFC chip can add value to the primary container or injection device while supporting the digitalization trend. A label-integrated NFC chip enables interactive applications to assist the patient during self-medication. In addition, he or she can access product information, video tutorials or specific apps, or easily perform

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digital product authentication to check product integrity. This enhances product and patient safety. In general, smart labels have to feature a special design that is optimally adapted to the specific application and container, also in the case of syringes and vials with tight radii. To ensure reliable readability of the integrated chips from production to end use, a flexible but robust label construction is crucial.

Paolo Grasso, sales director, Actega Metal Print

Next year will represent a post pandemic business recovery, with some of the trends that we've seen over the last 18 months continuing into 2022. For instance, the adoption of the web-2-pack model will no doubt increase, in addition to the continued and general rise of digital print across the sector. And importantly, sustainability will remain a key objective for most in 2022 and the decades to come. We already see this from brands and converters who are interested in our digital embellishment technology to help them reduce or replace their use of hot and cold foils, which are notoriously unsustainable. Although still in its infancy, we predict that in a few decades time, digital embellishment will be mainstream and the industry standard. Beyond that, digital print across the industry will continue to increase next year as mentioned, but perhaps beginning to incorporate other digital communications such as microchips and connected apps for a smart, enhanced consumer experience.

Lori Campbell, president, The Label Printers

For 2022, I would expect the uptick in demand we saw from some of the markets to taper off back to pre-Covid levels, which should help capacity and supply issues.

Harveer Sahni, chairman, Weldon Celloplast

While the situation prevalent due to Covid-19 seems to be softening, the after-effects are evident. The fear of yet another phase of the pandemic looms large. The industry which stayed locked in for most of last year and faced adverse impact has shown a fair amount of resilience and is fighting back. Increasing raw material prices, reduced workforce, and spiraling fuel and freight prices continue to trouble the label fraternity but the natural organic growth in the quantity of labels needed does drive a positive growth rate, despite depressed profit margins. The volume growth in India is driven largely by the younger median age of an increasing literate workforce with disposable income providing impetus to retail and finally an increase in need for labels and packaging. Pressure-sensitive labels continue to be the predominant format in a diverse range of label options. Wet-glue, despite decreasing market share, continues to hold substantial volumes and may remerge with new application techniques due to biodegradability and environmental concerns. Flexo continues to be the predominantly used printing technology though digital is now registering important installations due to an increasing requirement of short runs. If the pandemic continues to recede, the label industry can be expected to see a quantum jump when people start their visits to malls and markets and get back to their normal pre-Covid usage patterns.

Guido Van der Schueren, chairman, Hybrid Software

It's never easy to predict the future but several trends are abundantly clear. First, the world is still fighting its way back to normalcy after an unprecedented pandemic, and this will continue well into 2022. Label and packaging production was not impacted as severely as many other industry segments, but the pandemic accelerated the migration of label converters to more automated production methods, especially digital printing, and I believe this trend will pick up speed in 2022 and beyond.

I believe that 2022 will be a year of shortages in many areas:

“Trade shows returning and being able to travel will be a welcome addition to 2022. Although you can maintain relationships via online platforms, it is harder to make new ones”

manpower, energy, transportation and raw materials, to name a few. All of these trends favor digital label printing: labels can be produced faster and closer to the manufacturing process, in precise quantities which limit waste, with fewer human touchpoints. Variable data and personalization can also be added to increase the perception of value.

But automated manufacturing is a data-driven process, and this requires label designs that are printable, variable data sources that are correct, and manufacturing systems that efficiently map orders to available production equipment and substrates. What's the common element? Software. Companies like Hybrid Software Group that produce software to automate label manufacturing will continue to grow in 2022, and so will label converters of all sizes that implement it properly. I see a very bright future ahead for the label and packaging industry as we recover from the pandemic together.

Harald Wallner, director of international sales, Herma

We strongly expect the consequences of the Covid pandemic will continue to shape 2022. However, the fact that the world has managed to develop and produce highly effective vaccines in such a short time is a good sign. We should always remember the great success of this joint effort when we complain about the minor limitations we still have to live with at present.

We are very much looking forward to welcoming our customers in person again in 2022 at trade shows such as Labelexpo. These live events, in which we will increasingly participate next year, will probably have fewer visitors than usual. But talking directly to those who are seriously interested is invaluable. It creates understanding and trust – all over the world, these are two key factors for successful long-term partnerships.

In 2022, however, we will also see the digital infrastructure created in the previous two years become an even more natural part of the communication culture. Even to clarify more complex issues, you no longer necessarily have to jet around the globe.

Further progress is urgently needed in another area: global warming threatens us all. More and more people around the world are feeling it firsthand. Sustainability is a big word that we need to breathe life into. Recycle, Reduce, Renew are the order of the day. In recent years, we have already shown what is possible in this respect with self-adhesive materials. This will also be the focus of Herma's products in 2022.

Rachel Littleboy, marketing executive, Fix-a-Form International

Trade shows returning and being able to travel will be a welcome addition to 2022, especially for machinery manufacturers. Although you can maintain relationships via online platforms, it is harder to make new relationships. People like to see what they are buying, meet who they are talking to and generally build a rapport before making a decision.

I do think going in to 2022 businesses will still be focused on saving costs and sustainability, looking at different avenues on which products they can offer to financially secure their business in a world which has changed over the last two years.

According to The World Bank Group, the global economy is set



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to have its strongest post-recession pace for over 80 years. We know the recovery will be uneven in many different sectors and in different countries, but the label sector has continued with momentum despite the pandemic. E-commerce sales were already on the rise but the pandemic accelerated this and we will expect to see this continue in 2022. Pharmaceutical, clinical trials and food packaging were also in high demand, which I also expect to continue.

Ian Axelsen, business development manager, AA Labels

The trend for shorter order fulfillment times alongside shorter print-runs for labels will continue to drive process change in both customer accessibility and production terms. We live in a digital age and the embracing of technology is the key to success.

The Covid pandemic created an irreversible change in working patterns and social mobility with even more business purchasers ordering online and the more automated and easy online ordering processes, with fast delivery are increasingly becoming the expectation with customers.

Our own Express Print service launched earlier this year, has exceeded our anticipated level of usage and our recently introduced Click & Collect service is also being used by customers well outside of the mileage radius forecast, so much so that in 2022 we will also introduce a Click & Collect Plus service that will allow customers to collect the labels ordered online, in only one hour.

All of this has changed and continues to shape our production logistics and systems, along with our internet presence for mobile phone users to ensure that the whole process of placing orders, uploading design artwork, amending and approving soft-proofs and delivery preferences and schedules can be achieved as easily on a mobile as on a tablet, laptop or PC.

According to industry researchers the label and packaging markets are predicted to continue growing over the next five years and a lot of that growth will be about sustainability issues with label materials and adhesives that are environmentally friendly and part of a cyclical economy. The demand for removable and re-sealable adhesives will continue to grow.

John Attayek, CEO, Signature Flexible Packaging

I anticipate more business growth, more acquisitions, more innovations in technology, and less focus on Covid.

Danny Mertens, corporate communications manager, Xeikon

During the pandemic Xeikon brought many new innovations to market. We supported our customers and partners by leveraging digital communications and investing in live TV broadcasts, for example. For the future we don't intend to go back to past practices. We will expand our online communication tools and attend live events.

The pandemic has accelerated the uptake of digitization and automation with increased online ordering and demands for flexibility. In response we will be expanding our range of applications. For labels we are seeing strong growth fueled by the ever-growing trend for short runs and digital embellishments.

General trends we see for 2022 – the Covid health crisis will stabilize, the climate crisis will be all encompassing and businesses will have to offer stronger sustainability objectives.

Patrick Graber, strategic marketing manager for labels, Bobst

The label market will grow and the highest growth rate is in UV inkjet. All label companies need to move towards a multi-technology environment to enable greater flexibility and higher profitability. This is about optimizing your entire production. This trend will become stronger because price per label is continuing to decrease due to more productive and automated machines – mainly UV inkjet and all-in-one technology – with higher hourly

“In addition to investing in a more resilient supply chain, we are also focusing on innovation and sustainability”

output, which leads to lower cost per label and therefore a higher pressure on prices. The new all-in-one technology – inkjet/flexo – is going to bridge the gap between toner, first generation UV inkjet presses and flexo. In the flexo space, machines will become more digitalized, which improves agility and profitability in shorter runs.

Jorge Cordoba, general manager, Lintec Label

Pharmaceuticals, cannabis, food, flexible packaging and smart labels are all growing sectors that will continue to expand through 2022; we are looking to increase our business in these sectors.

Thomas Macina, global sales manager for labels and flexible packaging, Durst Group

The pandemic has had a significant impact on consumer behavior, and I see three to four main changes: first, consumption is short-term and unpredictable, as the sense of importance and urgency can change dramatically fast – pushed by uncertainties and external threats. Secondly, there is a de-globalization trend, so the local supply chain becomes more important. Also, individual consumption has increased significantly while collective consumption has decreased, and finally, consumers care more and more about our planet.

As a consequence, brand owners must react and are demanding their label suppliers to follow these trends as well. In other words, label converters need to have tools and processes in place to adapt quickly to the new demands, deliver long runs in the shortest possible time, cope with more and shorter runs, and implement environment-friendly solutions.

In short, I can predict the following needs for the label industry in 2022: reliability, simplicity and automation, productivity and cost efficiency to be able to deliver any label and run quickly.

Natália Lopes, marketing and sales manager, Lemorau

Every year we see a natural evolution of customer demands. Digital is becoming the future not only for printing but also for embellishment. Digital reduces the risk of errors, eliminates tools and provides a 'clean', easy and fast set-up.

Judging from our latest inquiries, we see a higher demand for tactile finishes. Whether achieved digitally or conventionally, customers are re-engaging with sensory label design. We are expecting to see a lot more requests for tactile solutions – with soft touch, rough textures, matte and gloss coating combinations, use of spot raised varnishes and integration of hot and cold foiling – combined with more automated functions such as automatic positioning of tools and turret rewinding, decreasing time and achieving a smarter production.

Laser cutting is also a trend that adds visual interest and minimizes tool usage.

When it comes to the pharmaceutical industry, where content must be flawless and production must be fast, we have seen – and predict a lot more of – systems that offer inspection, die-cutting, slitting and rewind all in-line.

Steve Burlson, sales and marketing segment business manager for label products, Coatings & Adhesives Corporation

The challenge of raw materials will continue to be a serious issue in 2022; we will need to be more adaptable and flexible than ever before as costs increase throughout the supply chain.



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“We will see the digital infrastructure created in the previous two years become an even more natural part of communication”

Victor R. Gomez, director, industrial label products, Epson America

Label and packaging converters are going to be facing similar challenges in 2022 as they faced in 2021. By that, I'm talking about workforce challenges, which has been a problem in the industry for years prior, but it's being accelerated now as more of the older press operators are retiring or are more at risk.

Because of this, digital printing is being brought to the forefront as it's easier to find people to operate digital presses. Young people, who may not be willing to take on a five-year apprenticeship on operating a flexo press, may be more willing to learn how to operate a digital press.

And, of course, the supply chain challenges that are front and center in everybody's mind are not going to be sorted out for a long while. There are no short-term solutions – it's a systemic issue that we're going to be living with for probably the next calendar year.

Todd Kennedy, owner, The Kennedy Group

I foresee continued supply chain and labor issues throughout 2022, as well as continued consolidation in terms of mergers and acquisitions.

Melissa Harton, marketing and key account manager, Acucote (part of Fedrigoni Self-adhesives)

For the first 4-6 months of 2022, we anticipate continued instability in both raw material pricing and the overall supply chain. Considering future raw material shortages and extended lead times, there is a possibility of additional price increases for our industry.

Sustainability is here to stay. As an industry, we must adapt, investigate and determine the most effective sustainable solutions for end users (based on their specific application/expectations). Converters will continue to focus on understanding sustainable terminology and trends in 2022. End user demand will drive suppliers like Acucote to offer additional thinner gauge options, sustainable adhesive solutions and certified materials when possible – e.g. APR, USDA BioPreferred, FSC, et cetera.

Corporate sustainable initiatives will also be a core focus for many of us as our customers, and their end users, expect us to use materials and methods that promote, recycle, reuse and limit the impact on the environment.

Despite the emergence of Covid boosters

and increased vaccine rates, consumers will continue to expect a certain level of tamper-evidence when it comes to food and beverage services. Secure closure labels that provide consumers with evidence that the package was not tampered with after leaving the restaurant or store will continue to be desired for food packaging in takeout and delivery services.

Grant Blewett, chief commercial officer, Miraclon

In 2022, we expect that three key trends will continue to drive the printed packaging industry forward. Converters are investing in technology and processes that will enable higher levels of on-press efficiency, running presses faster, for longer and with fewer changes. As printed brand graphics continue to become more complicated, an efficient printing platform, and adaptable plates and processes, will be essential in the packaging print toolkit. As a result, we anticipate flexo to continue making inroads into new markets previously dominated by gravure and offset. Advancements in flexo technology allow users to efficiently and cost-effectively achieve superior high-quality results while reducing delivery times and improving environmental credentials.

And with an increased demand from consumers for brands to develop sustainable packaging, this pressure is being passed onto converters who rely on technologies such as flexo to maximize press uptime, reduce start-up waste and produce the same quality print on rough or uneven – and more sustainable – substrates.

Matt Francklow, managing director, Creation Reprographics

In a year marked by instability and uncertainty, we're all looking to regain normalcy in the industry. It's clear that a major part of this is a strong re-focus on supply chain sustainability, which remains critical to the consumer. The coming year is set to mark real change for printers, not least when it comes to meeting environmental commitments.

We're anticipating that solvent-free plate technology will play a significant role in flexo in 2022. From our unique perspective as a pre-press partner, we are seeing printers explore new ways to bring 'green' technology earlier into their supply chain, which is where water-washable flexo plates drive real value. The volatile cost of solvent through the global pandemic has only strengthened the case for solvent-free printing.

Félix Prieto, general manager, Wanjie Europe

Needless to say, 2020 was unpredictable, especially during the second half of the year. We were not able to develop our sales work in the EU due to the travel restrictions. In addition, those customers that decided to invest often did it through their existing partners, so not too many chances for us. However, we were very lucky to sell, via video streaming, our Wanjie demo machine and installing in Slovakia a machine that was supposed to go to drupa.

2021 was a recovery year: customers have been accepting visits and, moreover, are ready to purchase different technology brands from their existing ones. In the first half of 2021 alone we were selling a machine a month. My perception is that 2022 will be a great year if we do not have another Covid variant, and Labelexpo Europe is the key factor for such a recovery.

Lakshminarayanan, business unit head, Signode India (Wintek)

After the damage caused by the pandemic in 2020 and the first half of 2021, the economy is still yet to fully revive but we are optimistic thanks to improved results across the industry in Q3 2021. 2022 will see revival and turnaround.

2022's outlook will be more dependent on surging e-commerce and changing consumer demand. We have seen the volume of smaller SKUs decline and consumers' buying patterns shift to bigger SKUs and a reluctance to visit retail stores and buying off the shelf, in order to remain safe.

Many start-ups have emerged in the last year, taking advantage of the e-commerce surge particularly in personal care and cosmetics, wellness and health products and catered to by digital technology. Conventionally printed packaging has seen a decline; digital has evolved to cater to on-demand and quick turnaround.

With continued volatility in raw material costs, the response is to reduce wastage. The technology shift is towards digital, in order to reduce wastage and be cost-effective.

Digital is the way forward for offering packaging and labels on-demand, with customized and seasonal promotions, to meet consumers' expectations and the evolving trends in consumption and demand.



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

The
GREENER
SHADE of
beauty

Shelf appearance is no longer the only priority of the beauty and personal care industry as it pivots to meet customers rising expectations for more sustainable products. Piotr Wnuk reports

The global beauty and personal care market continues to show strong growth potential. Consultancy Research and Markets valued the sector at USD 422.72 billion in 2020, with a forecast to reach USD 558.12 billion in 2026 – a staggering increase of USD 135.4 billion in just six years, growing with a CAGR of 4.82 percent.

However, as consumers emerge from Covid-19 confinement, the relationship with their surroundings has shifted significantly, moving their purchasing priorities towards eco-ethical considerations. Sustainability and efficacy now go hand-in-hand.

'Sustainability is a definite driver for this market,' says Chrissy Betsa, product manager for conformable films at Avery Dennison, Label and Packaging Materials. 'Brands are setting higher sustainability goals and looking for more options to meet them. The label is a big contributor here as consumers are also looking for brands that provide sustainable options.'

This is echoed by Springfield Solutions, a UK-based one-stop-shop for brand management, digital print and interactive media which is heavily involved in beauty and personal care sector projects.

'Sustainability is one of the significant factors both driving and influencing this segment,' says the company's Lauryn Hall. 'Be that through eco-friendly packaging or cruelty-free products, consumers in every market are demanding eco-friendly products as well as sustainable, recyclable or reusable packaging. This will drive other brands to switch to more environmentally friendly packaging components in the future, appealing to these consumer needs.'

'It's clear that there is a growing request for recyclable packaging and sustainable materials both on the container itself and on the label,' agrees Simone Baldin, business unit manager for labels in Europe at Taghlee Industries, one of the largest global producers of the BoPP films so heavily used in beauty and personal care packaging. 'The trend is towards using a certain percentage of recycled or biobased material with the aim of reducing the carbon footprint.'

UPM Raflatac's Eliisa Laurikainen, business development manager responsible for consumer goods in the EMEA region, says sustainability is now built in from the earliest stages of product development. 'Starting from the product ingredients, through the use of the product, to packaging, it's crucial to think about the circularity of the packaging and end-of-life considerations. Labels can actually have a huge part to play here; they can contribute to the plastic packaging recycling yield and quality,' she says.

The sudden shift in customer behavior and priorities fueled by the pandemic has been quickly picked up by companies in the health and beauty space, leading to a re-evaluation of all levels of packaging, from primary to secondary and tertiary.

A compelling example is Colgate-Palmolive's new Elixir line toothpaste in PET packaging launched in the European market in June 2021. The clear bottle with a transparent cap achieves a stylish look while being more eco-friendly than the traditional toothpaste tube made of plastic and aluminum laminates which are not recyclable.

As an additional sustainability benefit, this new pack format allows the toothpaste to be fully dispensed.

'Colgate Elixir's unique packaging technology is recyclable and designed to allow people to enjoy the toothpaste to the last drop,' states Liz Mellone, director of oral care packaging at Colgate-Palmolive Co. 'Moving into a rigid format enabled us to achieve a counter-worthy appearance throughout the entire usage cycle of the product.'



Personal care brands look to include recycled content in their packaging

"Sustainability is one of the significant factors both driving and influencing this segment"

Achieving more sustainable packaging requires more than just changing pack formats, however. It requires suppliers all along the supply chain implementing their own sustainability programs.

'Brands and retailers need to work with suppliers that are taking sustainability seriously and set realistic targets that the supply chain can achieve,' says Susan Ellison, joint managing director of OPM (Labels & Packaging) Group based in the UK. 'This isn't about just making a pack or label recyclable – it's about ensuring their entire supply chain is sustainable. At OPM, we print using water-washable flexographic plates, for example, which reduces our overall carbon footprint. We operate a fully digital workflow to minimize carbon-costly journeys and utilize LED lighting systems to reduce our energy output. These are all relatively simple measures but they reflect our commitment to sustainable operations, not just products. We also only work with suppliers that take their sustainability objectives seriously too.'

What is sustainable?

The proliferation of recyclable films, biodegradable and compostable materials can create confusion for brand owners as to which is the most sustainable route.

'It's not easy for a packaging designer to think, nor to compare all the possible viable options there are. You should really have all the information to help you tell what the most sustainable packaging solution for the environment is,' comments UPM Raflatac's Eliisa Laurikainen. 'For global brands, there's even more complexity in this picture since there are different regional guidelines, and recycling infrastructures are not the same everywhere. For label materials, we've tried to make it easy for brands to understand the impact of their label material choices with our Label Life by UPM Raflatac lifecycle assessment (LCA) tool. This tool provides users with a concrete measurement of how to reduce the footprint of packaging.'

Sustainability initiatives in the personal care space have focused not just on recyclable materials but also refillable and reusable containers. Refillable is an effective and efficient system with the store able to buy products in bulk, while reusable containers can be



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collected cleaned, filled with a new product, and sent back to stores.

The overall goal of all these initiatives is zero waste.

'Zero waste sounds very challenging, but we must be brave enough to aspire to this and start taking steps towards that goal,' says UPM Raflatac's Eliisa Laurikainen. 'Enhancing recyclability is a must, and we need to keep the materials in the loop. Supporting the circular economy should be the target for everyone working in the packaging value chain. Although they're a small part of the final packaging, labels can have a huge impact and support packaging circularity in many ways. Reusable containers can use washable or dissolvable labels to carry the product information. Furthermore, wash-off labels on PET containers have already been on the market a long time. With HDPE and PP packaging, we recommend recycling-compatible labels.'

The use of refillable and reusable containers reduces manufacturing costs and waste, but the success of this system relies on multiple factors. This may include acceptance from the public, additional costs incurred on the supply chain, and availability of the right kind of containers in large quantities.

'Reusables are a great way to bring your brand sustainability story to light,' says Adam Moffitt, UPM Raflatac's business development manager responsible for food and beverage for the Americas region. 'Choosing the right package for your product and utilizing labels to give actionable instructions to the consumer is crucial. Removable or wash-off capable labels are ideal in this environment. You can easily change the look of your brand while using the same base container. We've seen quite a bit of growth in this area and it's showing no sign of stopping.'

Unilever is expanding its refillable packaging trials across the UK, including its first 'return on the go' refill trial in selected Asda supermarkets and Co-op convenience stores. This move comes after the successful launch of its largest refill trial in Europe – in Asda's sustainability store in Leeds, UK, in 2020. Unilever's new trials will be the first of their kind at this scale in the UK.

'To tackle plastic pollution with the speed and urgency needed, we are committed to creating scalable solutions which make it

“Supporting the circular economy should be the target for everyone working in the packaging value chain”



UPM Raflatac's Label Life lifecycle assessment tool was developed to make it easy for brands to understand the impact of their label material choices



The shape of a container and amount of squeeze required will guide the level of label and adhesive conformability needed

as easy as possible for people to make sustainable choices,' says Sebastian Munden, Unilever UK and Ireland general manager and executive vice president. 'We believe refills could be a gamechanger in our ambitions to halve our use of virgin plastic by 2025. However, unlocking the full potential of the reuse economy would require a significant shift in how people shop. Using our well-known and trusted brands while working closely with retailers, we're testing different refill models on a large scale to continue building upon our understanding of how to bring about a significant change most effectively.'

Insights from the Unilever trial, as well as research commissioned by the company, found that 94 percent of UK consumers are more likely to invest in refills vs. buying new products in store if available, and 89 percent are likely to buy a product because its packaging can be reused.

Coating trends

Coatings function not only to protect products but also to add tactile effects – particularly important in the cosmetics market.

'With e-commerce driving sales of beauty products, resistance to damage in transit is a key factor to consider when choosing the right finish,' says Sarah Harriman, marketing and communications manager at Pulse Roll Label Products. 'As well as product protection, print finishing in the personal care and cosmetics sector is used for aesthetic appeal and embellishment is becoming increasingly more sophisticated as brands continue to look for a premium and luxury look to stand out on the shelf or screen. For example, with our PureFinish gloss varnish, impressive eye-catching effects to attract the consumer's attention can be achieved using casting and curing as part of the decorative finishing process. It's also a cost-effective and sustainable solution as the casting film can be reused.'

As well as embellishment for visual appeal, tactile effects can be used to encourage greater consumer interaction.

'We've seen this first-hand with unprecedented interest in our new PureFX Soft Touch Varnish launched in August,' says Harriman. 'This product innovation was driven by demand from converters and end-users for a UV soft-touch coating. Many printers use a soft touch lamination film as it's hard to replicate the same high-quality results with a UV coating due to the very nature of UV free radical curing. Our R&D team challenged themselves to come up with a high-performance UV alternative that possessed both the soft touch and high resistance properties required to protect product packaging from scuffs, rubs and chemicals. The result is a lower cost and more

sustainable option for achieving a high quality "soft" touch and feel.'

Intelligence and interaction

Avery Dennison's Chrissy Betsa sees growth in the premium care segment coming from consumers buying fewer, but higher quality items. 'Consumers are willing to pay more for products that save them time and bring them joy and excitement. Technology in packaging is on the rise as consumers seek security, information, emotional engagement, entertainment and convenience – QR codes for information on the product or RFID technology.'

Neil Percy, brand management production manager at Springfield Solutions, says designers are thinking more about interactive packaging and tactile finishes because the shelf standout is no longer as important as it once was. 'The focus has now moved to how the product looks and performs in the home because of the significant increase in e-commerce. Innovative packaging is all about engaging and interacting with the consumer and finding new ways to do so. This may be through QR codes, augmented reality, eye-catching packaging featuring foiling and tactile finishes and even eco-friendly label materials.'

Adds Susan Ellison: 'Enabling consumers to find out more information, deliver video or guidance via QR codes linked to websites and personalizing the entire experience can be powerful. With consumers having embraced QR codes more during the pandemic, integrating apps into packaging is certainly moving packaging up in the marketing mix for brands.'

But Ellison points out that QR codes are not the only way to add functionality to packs. 'We know brands in the beauty and personal care market are under pressure to cram as much information onto packs so they can meet today's demanding regulatory requirements. Interactive packaging can help somewhat toward this need. However, clever packaging and labeling design can also be an attractive alternative to interactive technology. We've developed the Multi Dex Label – a multi-layered, multi-indexed, multi-substrate, multi-colored, peel and read label. It enables brands to maintain eye-catching shelf appeal using color on multilayers while providing a functional label that yields extra space for brand information. It has an adhesive hinge that can be placed anywhere within the label allowing the pages to be peeled back to reveal additional printed layers, which can then be resealed repeatedly once read. From language requirements to regulatory information that can make a label too "noisy", it's a great solution.'

Circular economy

Avery Dennison's Chrissy Betsa thinks



Colgate-Palmolive's new Elixir line packaging is fully recyclable and guarantees that the contents can be squeezed out completely and with ease thanks to its LiquiGlide coating technology

"Technology in packaging is on the rise as consumers seek security, information, emotional engagement, entertainment and convenience"



Unilever is expanding its refillable packaging trials across the UK, including its first 'return on the go' refill trial, in selected Asda supermarkets and Co-op stores

there will continue to be a big focus on sustainability in packaging and the idea of achieving circularity. 'It will be interesting to see if this will continue down the path of recycled content/enabling recycling or exploring the zero-waste category. Also, I believe the focus on personal wellness and self-care will continue to be a trend. The millennial generation finds importance in what they put in and on their bodies for health and wellness. Their wellbeing from skincare to nutraceuticals will continue to lead as a focus in the beauty and personal care segment.'

Springfield Solutions' Neil Percy adds: 'I think we'll see an increase of sustainability in packaging over the next five years. Instead of buying new every time, we'll change to refillable packaging. We are increasingly conscious of our carbon footprint, and I think this will be a big move forward with packaging that will be able to make a difference. I also think we will change our buying habits from buying products individually to subscription services.'

Susan Ellison stresses that while consumers still want to see a breadth of choice and new products, 'these ranges will meet several environmentally positive objectives; they will either be made of recycled materials, designed for the recycling infrastructure with single materials, or utilize a refillable and reusable strategy.'

Duncan Wilkinson expects the market will be transformed in five years. 'Who would have expected to see so many Tesla cars on the roads as we do now? I expect the packaging industry will be equally transformed. Not only by governments making legislation, but I also think the consumer movement will have an impact, as individuals actively choose to purchase more eco-friendly products.'



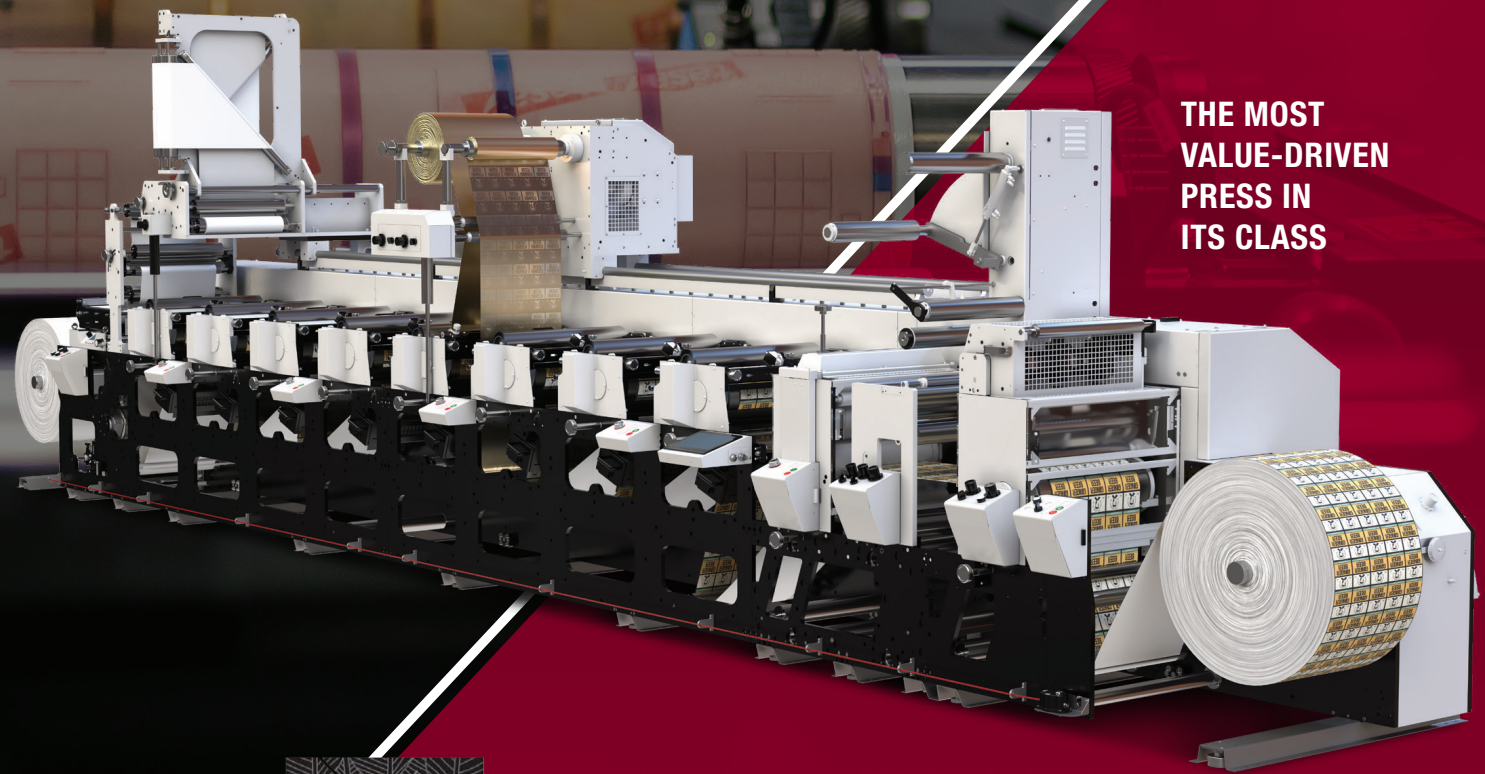
For more information, watch the panel discussion 'How sustainable is your converting business?' available through the Label Academy: link.labelsandlabeling.com/panel

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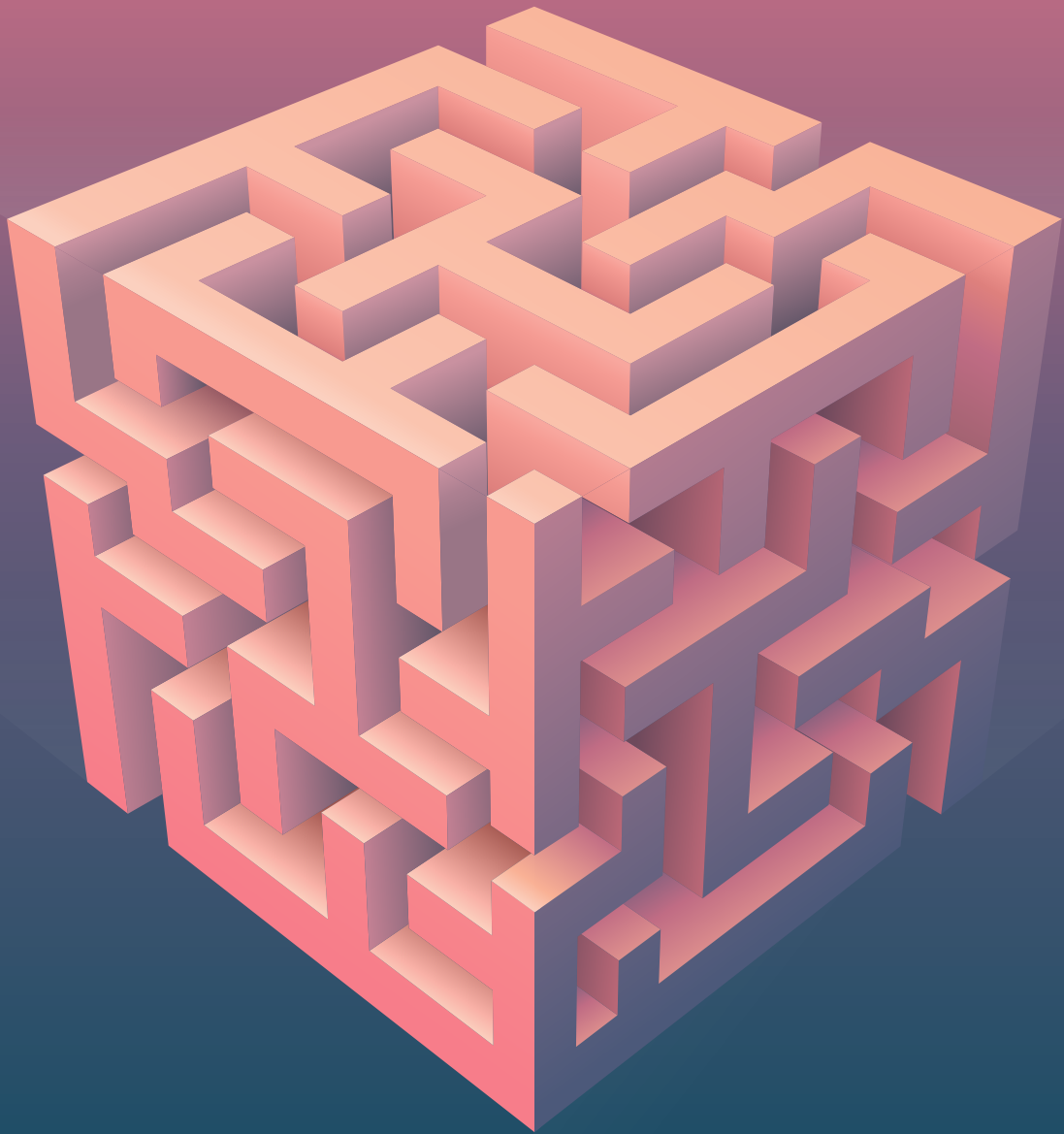
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The global supply chain in flux

*Disruptions to the global supply chain have left converters and suppliers asking what's next and battling to stay ahead of the curve.
Luis Rodriguez reports*

Though it's easy to hold the Covid-19 pandemic responsible for the global supply chain disruptions of the past 18 months, there are a multitude of issues that have put pressure on an already vulnerable system.

'What's going on with the supply chain is a confluence of many different happenings. It's really a perfect storm of highly disruptive events,' said Jeff Ogren, North American business director at Bostik during the TLMI Annual Meeting in October 2021.

Unfilled workforce positions, issues with freight and shipping, and random natural disasters are just a few of the root causes of the current bottlenecks and delays across the global supply chain.

In a report by the US Bureau of Labor Statistics looking at the labor shortage, the number of resignations increased to 4.3 million in August 2021, leaving the total number of unfilled positions at 10.4 million with no obvious signs of a slowing or downward trend.

'People are reevaluating their lives due to the pandemic,' said Ogren. 'People may end up retiring early. A lot of people are making those personal choices. All these different things are happening that are driving the issues we're seeing today.'

One of these is the persistent issue with freight, overseas shipments and blockages at ports across the globe.

Earlier in 2021, the Ever Given, a 400-meter-long vessel carrying over 18,000 containers, became lodged in the Suez Canal for six days. The financial cost of this is still being evaluated, but this single event is only one part of the larger supply chain issues.

Ships have continued to be anchored off the Port of Los Angeles – one of North America's largest – for days, carrying thousands of shipping containers full of a wide range of products. This situation is repeated across many ports and warehouses on both coasts.

Labor shortages and delays are persistent in the freight industry as well. About 71 percent of the US economy's goods are moved through freight, according to the American Trucking Association. The industry is short 80,000 drivers as of October 2021, which is

"You go through price increases, that's one thing. But the shortages of materials – we've just never had to operate under these types of constraints before"

making it difficult to keep products moving.

'Freight, in my experience, is more at a premium today. And I think it's been more unpredictable as well,' says Bill Podojil, vice president, sales and marketing, label and graphic materials North America at Avery Dennison. 'Early on, we were running into challenges where we would have a truck that would seemingly go missing and we would end up finding it on the side of the road somewhere. Just things that we never had to deal with before.' He adds that based on conversations had with others, these problems seem commonplace across the label industry.

Adding to the already strained workforce and supply chain, multiple natural disasters occurred over just a few months, causing even further complications.

Through February 13-17, 2021, Winter Storm Uri swept across North America, dropping snow over places that hadn't seen it in hundreds of years. In Texas, the snow combined with the freezing

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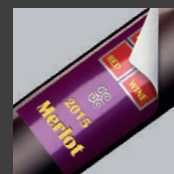
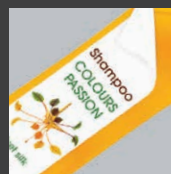


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“In 2020, moving a container from Asia to ports on the eastern US seaboard typically would have cost 1,000–2,000 USD. Today, it’s close to 20,000 USD”

temperatures to result in blackouts across the state, causing major issues with the chemical producers based in the area.

‘It never snows in Texas until it snows in Texas,’ said Ogren. ‘This massive ice storm wiped out a significant portion of the major specialty chemical producers. And because some of these are open air facilities, pipes burst and equipment failed. This caused the first major, dramatic supply chain disruption in the specialty chemical market. And, in some ways, we haven’t fully recovered from that.’

In August this year, Hurricane Ida hit the Gulf Coast, causing further issues with these same manufacturers who were still recovering from the winter storms.

What about the label industry?

Providing its services across markets ranging from food and beverage to aerospace to manufacturing, the label industry proved to be resilient throughout most of the Covid-19 pandemic. But now, as disorder in the global supply chain continues, the industry is facing unprecedented challenges.

‘I’ve been in this industry for 25 years. You go through price increases, that’s one thing. But the shortages of materials – we’ve just never had to operate under these types of constraints before,’ says Shane Lauterbach, president and CEO of Lauterbach Group, a label converter.

Shortages in raw materials, price increases across the supplier base, demand increases from both converters and end users, and continuing delays in shipping are a few of the major problems the industry is having to navigate.

When the winter storm swept across the United States, a significant number of domestic suppliers became incapable of providing the raw materials needed to manufacture the products necessary in the label industry.

‘When you look at the chemical manufacturers who are making adhesives, polypropene, or any of the other chemicals we use in films, face sheets, or anything like that, there’s somewhere around 50 or 60 of these companies in the US that are in force majeure status,’ says Lauterbach.

Due to many of the manufacturers in Texas claiming force majeure because of the ‘big freeze’, Avery Dennison, like many other label industry suppliers, was left to figure out where to procure its supplies.

According to Podojil, this led to the company leveraging its global supplier base more than ever before. But because of the labor shortages and other ongoing issues at ports, this solution unveiled other, previously unseen, consequences.

‘We have had a few challenges at the ports, mostly with customs and waiting for containers to be unloaded. And because of this, if we’re late getting our materials, we’re going to be late getting the finished product to our customers,’ says Podojil, referring to what he calls ‘the domino effect’: because the raw materials suppliers are having a shortage, Avery Dennison is having a shortage, leading to shortages on the converter side, and ultimately, the end users.

This succession of shortages is causing difficulties keeping up with the increasing demand, which according to Podojil ‘peaked at the start of 2020 and hasn’t slowed down since’.

Echoing this sentiment during a panel discussion at the TLMI Annual Meeting, Tim Kirchen, senior vice president at UPM Raflatac, said: ‘Consumers have been saving and were sitting on this pile of cash. And then came January 2021, when consumers started

to unleash this cash at a rate that was 20 percent higher than usual. Goods that need to be manufactured, goods that need to be labeled, goods that need to be packaged and then labeled again.’

Though not many could predict how high demand would rise, it didn’t come as a complete surprise for some converters. Lauterbach Group, for example, prepared by ordering more materials. However, difficulties came when consumer demand continued to rise as supplies dwindled.

‘We pre-bought a significant number of materials. The problem was it only lasted a short while, but the demand hasn’t stopped. Now, we’re in the throes with everyone else that is trying to manage supplies through these constraints,’ says Lauterbach, who adds that it’s impossible to predict how long these shortages are going to last.

And Lauterbach Group was not the only converter that looked to get ahead of the curve.

Podojil confirms: ‘Between March and June of 2020, there was a lot of prebuying from our customer base, which I totally understand because nobody understood what to expect. But from the summer to the fall of 2020, we started to be able to balance our outbound shipments with the up-ticking demand, we were able to get a little more even. But after the holidays, the demand has just kept on rising.’

And as demand continued to increase and stock shrunk across the industry, suppliers of film, inks, papers and other materials announced a series of price increases. Looking at the current prices of international freight and shortages of raw materials makes this easier to understand.

According to LPC, a marketing communications and industry research company, in 2020, moving a container from Asia to ports on the eastern US seaboard typically would have cost 1,000–2,000 USD. Today, moving that same container along the same route costs close to 20,000 USD.

‘All the supply chains for label materials are exhausted. Whether that’s for adhesive components or liners or thermal papers, supply chains are exhausted and there is very little stock,’ said Kirchen.

During these difficult times, many companies are asking when everything is going to go back to normal. When can converters, suppliers and end users expect to order a product one week and receive it the next? There is no straightforward answer.

‘We’ve heard predictions from Q1 2022 to something that’s going to be extended to the length of 2022,’ says Podojil. ‘I think most of us in the industry are trying to take a more positive outlook. But I think most of the issues are tied with the demand, which I haven’t seen slow down.’

Kirchen predicted that there won’t be a full recovery of the freight industry throughout 2022, adding that a developing energy crisis in China may have a further negative impact on the supply chain.

‘I wish that, come Christmas, everything will get better and we’ll get back to normal next year, but unfortunately that’s not the case,’ said Kirchen. ‘On the materials side, we probably will see some temporary improvements here and there and we may even see some things worsen with certain products, but we don’t think there will be a significant change until at least the middle of next year.’

The other side of disruption

Many of these disruptions are out of the hands of any individual



“Winter Storm Uri swept across North America, dropping snow over places that hadn’t seen it in hundreds of years”

company. This is a systemic issue that will more than likely continue in some way or another for years to come. However, there are ways to take some control of the situation, to make sure issues don’t compound and cause further problems. One of which is understanding that, from a global standpoint, the label industry is relatively minor.

‘When you ask what you can do, I think part of the process is understanding that you’re insignificant to the global system. If a company needs acrylic monomers for adhesives but the massive paint companies also need them, you have to think: which is the bigger industry, paint or adhesives for pressure-sensitive labels? It’s almost always going to the paint companies. And that type of competition goes for practically every industry, because we’re just a subset of these suppliers’ portfolios,’ says Lauterbach.

Another step in this process is understanding that for the foreseeable future, just-in-time and overnight delivery are not going to be doable.

‘This was an industry used to 24-to-48-hour delivery, which was pretty inefficient at normal times and pretty much impossible now.’ Kirchen also emphasized that it’s important to keep expectations realistic and good communication is going to be more important than ever. ‘As for what we can do now, we can actively and openly communicate with each other, with suppliers, so we can manage this chaos together.’

Communication all the way down the supply chain is going to be the key, agrees Podojil, especially as prices, availability of supplies, and lead times will continue to fluctuate week by week.

‘There was an adjustment phase earlier this year. Some people

were already used to those shorter lead times and hadn’t planned into the future, so we had to approach them saying that you have to plan further so we can at least work with our own suppliers to make sure you have those orders when you need them,’ says Podojil. He adds that though the disruptions are still causing problems, there at least haven’t been any further downward swings on shipments and deliveries.

But although the problems seem to be plateauing, there is still a lot of work to be done. From the start of a product’s life to the end, everyone is going to have to continue working to keep the fluctuations in check. And according to Lauterbach, based on conversations with the company’s suppliers, that’s exactly what’s happening behind the scenes.

‘From the materials suppliers, and the companies behind them, there are a lot of great people working hard to fix this. And I think that gets lost in the turmoil. All these improvements, all the communication, and the hard work going into trying to find the solutions throughout the supply chain, is getting buried,’ says Lauterbach. ‘It’s easy to get frustrated with the day-to-day problems, always figuring out what’s next. But I’m positive that there will be tremendous innovation and improvements that’ll come out of this process from the suppliers to the converters and with our clients.’



TLMI members can view recordings of the Annual Meeting sessions, including the panel discussed in this article, at www.TLMI.com



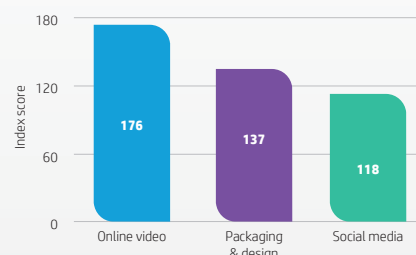
Brands big and small need your help to push what is possible when it comes to **packaging**.

Packaging is becoming one of the **most effective channels for advertising**, unlocking a demand for digital printing that is, in turn, forming stronger connections between brands and customers. Brands are beginning to wake up to the power of digitally printed packaging but they have yet to understand the full package.

Recent findings from the **World Advertising Research Center (WARC)** put this growth opportunity into concrete terms. WARC has been publishing research on the effectiveness of digitally printed packaging as a marketing strategy for many years. In association with HP, WARC carried out an in-depth analysis of successful case studies that used packaging as lead media.

The WARC research shows that **packaging is the 2nd most effective media channel** (just after videos) but only 5% of brands consider packaging as a growth enabler. This said, **the remaining 95% are unaware** or resistant to embrace the opportunity thinking that digital printing is way too expensive. Until recently, brands have not been able to exploit this channel because of the operational challenges that controlling and managing the supply chain presents. This is where we come in, together.

Lead media that over-perform for sales and market share metrics:



Note: Creative Effectiveness Lions Winners, 2011 - 2019
Source: The Effectiveness Code, Cannes Lions & WARC 2020

As leaders in digital printing, HP has helped hundreds of brands and printing providers enter new markets and win in uncontested spaces, from high-value labels to flexible packaging. Now, the quantitative data validated through the WARC research shows how HP's digitally printed packaging can be a salient brand accelerator touchpoint. When discussing how these innovations can drive brand innovation, David Tiltman, the VP of Content at WARC says:



David Tiltman

“Digital print means that short printing runs – which used to be cost-prohibitive – are now within reach for more brands. That opens up packaging as a creative outlet for personalised or customised messages.”



With innovative digital printing abilities, label and packaging converters are set to fundamentally change how this industry looks at digital packaging as a brand innovation touchpoint.



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The Power of Packaging

Packaging is ad space. This simple realization is **changing the way brands think of packaging as part of their marketing strategy**. Today brand experiences transcend place and platform – a brand is not just a quippy Twitter account nor is it just a bright red package sitting on a shelf. To create a single, cohesive brand experience, the physical and digital presence of a brand need to be seamlessly integrated.

Innovation in digital print packaging technology is pushing this cohesion; the in-store experience can now align with other channels in the marketing mix, both online and offline. Now brands of all sizes can deliver personalised, customised messaging that can complement social media strategies and mirror a brand's digital presence.

In short, digitally-printed packaging turns shelf space into a **new channel for marketers** to deliver campaign messages and drive ROI, allows for a flexible approach based on individual markets, increases the speed at which brands can test new packaging, allows brands to have more physical and digital cohesion, empowers brands to co-create content at scale that maximizes engagement with Millennials & Gen Z and **provides opportunities for longer-term brand-building** through personalised and contextual variations in the packaging of products.

Effectiveness and amplification

Packaging can be the **first touchpoint** a consumer has with a brand and up to **70% of consumers are impulse buyers** who grab products that appeal to them on the shelf. Given this, it is vital to invest in packaging and enhance the in-store experience.

When brands use packaging as lead media, there is a genuine link to marketing effectiveness, with a further upswing in hard metrics including sales, market penetration and revenue, when digital printing is utilised.

How can digitally-printed packaging enhance the customer experience and deepen their connection with the brand? Firstly, it can create a **sense of exclusivity**. Digital printing means that it is easier and more affordable than ever to produce limited edition packaging that can drive desirability.

If delivered in the right way, these limited editions hold a special place in culture and can become a collectible for customers that they hold on to long after the campaign comes to an end.

One example of this is the Faces of the City campaign Coca-Cola launched in China that used variable printing on limited edition cans to highlight 23 cities across the country with an augmented reality game triggered by scanning the can. Each can sold at a 30% premium to the standard price and even so **there was a 226% increase in sales**. Second, digital printing means brands can make **packages personalized and customized** without disrupting their printing process.

According to WARC, **53% of Gen Z want brands to offer personalised or customised products**. Personalized packaging can become a vehicle for consumers to express themselves or their preferences and allows consumers to select the packaging that speaks to them individually.

Overall, digital packaging in the media mix amplifies the impact of other channels while reducing the pressure to invest more in mass media channels due to the increase in earned media reach (virality) that personalization and co-creation generate. A product's packaging is often the first interaction a consumer has with a package goods brand. In many cases, **the packaging helps to reinforce key brand messages communicated through other channels**.

Digital printing is being used to elevate brands through **Storytelling and co-creation**

With digital printing, brands can now use their **packages as a platform for storytelling**. The customization and adaptability of digital printing means that packages can now convey stories that are more relevant to specific audiences. These stories have the ability to truly connect the brand's ethos with customers when delivered in a sincere way – **emotion is used by 41% of successful cases that lead with digital printing**, significantly over-indexing against the average.



KRISTI SCHROEDER

Brand Design & Packaging Director, Kimberly-Clark

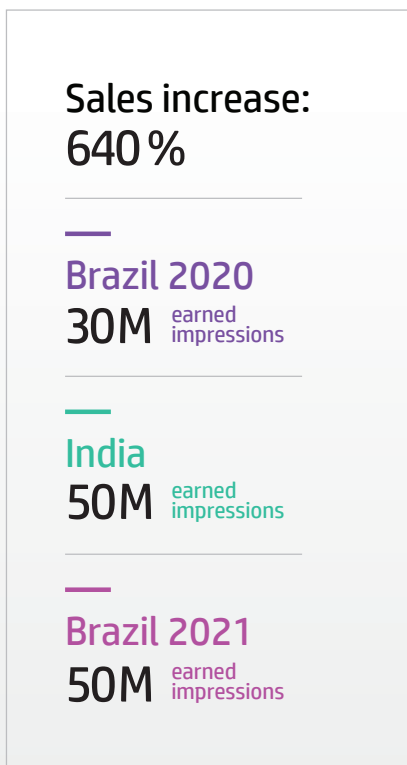
“The power of great packaging is not having to explain any of the details. It is love at first sight – the consumer is drawn to the [packaging] in seconds. The packaging is a storytelling device that should convey a compelling message and differentiate the product from the competition.”

Digitally printed packaging also allows brands to create **distinctive, interactive, and shareable experiences** that can directly involve the consumer in the packaging design process which amplifies the potential for social sharing. This means that brands can now tell stories with consumers, not just to them.

Packaging can be more than a vehicle for individual stories. Some brands are using packaging as the basis for purpose-driven campaigns to highlight the social issues that are growing drivers of consumer purchase decisions. Packages printed with purpose appeal to people and make consumers feel not just aligned with a brand but as though **the brand is listening to and catering to their wants and needs.** Hershey's provides an example of packaging being the center of a purpose-driven campaign to drive gender equality with the younger generations of women. In 2020 and 2021, **Hershey's launched a customised**

packaging campaign for **International Women's Day** in Brazil and India. The brand invited female artists to showcase their work to create a **“living canvas”** on the chocolate's packaging which Hershey's printed on the limited-edition wrappers.

The sense of exclusivity led to the bars selling out within just a few days, illustrating how varying packaging can directly link to hard metrics, such as sales. **The results are impressive:**



Beyond the deep connection that can be achieved with storytelling, the adaptability offered by digitally printed packaging gives brands an **efficient way to test the market prior to brand launch.** Before investing in a full redesign or relaunch, brands can query a smaller proportion of the market, using

feedback to adjust the brand experience in response to customer sentiment. To summarize, storytelling is a powerful tool for brands to engage customers and now that digital printing has made packaging a more versatile canvas, even the smallest package can be a vehicle for a big and impactful story.

Along with storytelling, what **can bring customers back is the ‘extra factor’.** Packaging, and the role it can have in delivering an experience that speaks to individual customers, is well-placed to provide that something ‘extra’. One such example is Nescafé's campaigns Resolutions and Tribute, which have run successfully for 5 years. These have become a benchmark in the industry as proof of long-term brand success and adoption of a relatively new technology like digital printing.



Both Nescafé Tribute and Resolutions Campaigns were extended over **5 years** across multiple markets resulting in **double digit growth**

To wrap up

The research shows that **packaging can be an ad, a story, a platform, a strategy, and a huge driver of sales and positive sentiment.** With HP INDIGO, print providers can bring innovative packaging solutions to life for brands big and small. Packaging is not just a wise investment as part of a brand's marketing strategy, it is a place to reduce waste, be more inclusive, be more adaptable, and push the marketing industry forward as a whole. **All you have to do is print.**

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Seeing through touch

Jordan Hart investigates how braille and tactile elements are incorporated into packaging

In packaging and labeling, the focus is often on functionality and the appearance of the product. However, the World Health Organization estimates that there are 45 million people who are either fully blind or visually impaired – meaning millions of people will experience products through touch, not through sight. While some countries have mandated braille on medical packaging, it is mainly left to consumer goods manufacturers to decide how to cater to the visually impaired, if at all. Packaging with tactile elements, whether braille or tactile symbols, can cater to a new audience and expand marketability.

“Packaging for the visually impaired must overcome two challenges: design and application”

‘Only a handful of beauty brands have invested in packaging that’s accessible for the visually impaired,’ according to Vogue Business. One brand that invested early on is L’Occitane. As Vogue Business detailed, the founder of L’Occitane noticed a blind customer in a store feeling the bottles in an attempt to get familiar with the product in the 1990s. As a result, the company started incorporating braille into its packaging in 1997. While the majority of the brand’s products now feature braille, its progress has not come without struggles: around 30 percent of the brand’s products still do not feature braille due to technical constraints. According to Vogue Business, ‘The brand has found it particularly challenging to include such lettering on smaller products like soaps and tubes.’ L’Occitane is justified in this struggle: designing for touch, rather than sight, is a new and challenging avenue of inclusivity. Packaging for the visually impaired must overcome two challenges: design and application.

Design considerations

Designing packaging that is meant to be touched as well as seen presents unique challenges. Brand strategist and L&L columnist Vicki Strull explains some of the elements that must be considered. ‘The intent of sensory marketing on packaging is to engage and connect with customers at the retail shelf. What we’re really talking about is haptics and texture, but it’s a poignant technique to engage and assist the audience we’re talking about, the visually impaired. I work with a variety of food brands, including a premium dried-fruits brand. If we were designing for the visually impaired, we might include packaging and pouches that have a different texture for each product – cherries, apricots, plums, figs, raisins, cranberries and so on. The design would be engaging for any shopper, but would specifically alert someone who is visually impaired as to the product differences.

‘I think it’s important to note that when you take into consideration a specific audience – in this case, the visually

impaired – your design shouldn’t detract from the experience of your broader audience. Rather, the design is an addition to ensure you’re meeting the needs of a specific audience, i.e. it’s inclusive. We’re actually adding a layer of communication that can also dual purpose as engagement for our sighted community, and we’re using haptics to do that.’

Designing for inclusivity can have a payoff for brand engagement, according to Strull: ‘From what I see with brands that are focusing on inclusion and specific audiences, when you do include design that supports their needs, that audience, that community, is appreciative. They hear about it, they share it with their fellow communities, so brands actually get a very niche targeted audience talking about their product because they’ve identified needs and supported those needs in their packaging design.’

In terms of considerations printers and packaging designers need to account for with packaging for the visually impaired, Strull says: ‘You need high contrast, you need large fonts, you need a lot of haptics. We’re designing for the sense of touch, and that starts with the substrate.’

‘Then you go into different textures,’ she continues. ‘You might include some tactile finishing, some spot gloss, maybe some matte or soft touch. It could be overall or spot, depending on the intention of the label and what it is communicating about the brand and to the shopper. Because we’re talking about different finishing techniques, converters have lots of options conventionally and now they are easily executed digitally, using Scodix or MGI. Once digital finishing is involved, then the possibilities are endless, down to personalizing, making each one different, and other versions.

‘As a brand, you’re always listening to your audience (or you should be). When you understand how a package can assist them, engage them, and provide information, then you can create a package that is not just inclusive, it creates a memory, a perception, a sale and even a 5-star review.’

Application considerations

As in any language, ensuring correct spelling is essential, especially for medical packaging. Adding an extra space or an extra dot could change the meaning of the word, or the dosage information on medicine. To take precautions against this, printers may need to invest in new quality control equipment.

Manage Artworks details several considerations converters need to take into account including that dots are not universal across all braille languages, the diameters of the dots and offsets need to be clear when touched, and printers should expect longer set-up times for projects with braille. All of those factors can increase costs for a project by anywhere from 5-25 percent for converters, according to Manage Artworks.

Additionally, where and how the packaging will be used matters with braille packaging. One blind shopper told Food Navigator that braille should be embossed into packaging so it is more durable. She explained: ‘If you put sticky labels on things, then put them in the freezer, they can disintegrate eventually.’ Converters will want to

ensure that the braille on packaging is just as legible and durable as any other product information.

Braille Ale

While adding braille is an additional step in the design and production process, some companies have found it to be more than worth the effort. Last year Kentucky-based converter Steinhauser partnered with West Side Brewery and the Cincinnati Association for the Blind and Visually Impaired (CABVI) to print a specialty beer label named the Braille Ale. This Braille Ale label recently won best of category in the Graphic Media Alliance 2021 Print Excellent Awards for the flexographic printing category.

'The printing on our flexographic press wasn't going to be an issue, as it is all line work. The real concern was the braille itself,' says Erin Dickman, senior account executive. 'We confirmed with our local screen manufacturer that we would need a special tactile screen to get the braille to register as readable.'

She explains that they needed more height on the dots, and it was a challenge to find a supplier of the correct screen. 'We kept searching through our suppliers and finally found the screen we needed, but it had to come from Europe, which was a big issue due to the pandemic.' As this project started at the beginning of the pandemic, Steinhauser had to wait months for the screen.

After the shipment delays, the screen was installed and the Steinhauser team was able to print the first label, only to run into another problem. 'We realized we needed someone to check it who could read braille,' says Dickman. She drove to CABVI and was able to have someone who was visually impaired and fluent in braille inspect the label. After getting the go-ahead, the project was

successfully completed.

According to Dickman, the project was a real collaborative effort. 'We reached out to many of our suppliers and told them about this project and, for the initial run, many aspects were donated including the materials and time on-press.' The initial run was 16,000 12oz can labels, and subsequent runs have since been produced.

The entire project was printed on Steinhauser's MPS EF530 press. The key differences in the project versus a standard label were the screen and the special tactile used. 'With the right tactile varnish and the right screen, it wasn't a challenge for the press to achieve the result,' says Dickman. 'There is no reason why we wouldn't consider any addition of braille to any project in the future.'

During challenging times, the project was uplifting for Steinhauser. 'This was the first time as a company that we printed braille,' says Dickman. 'We celebrated it internally as a fun project, as something positive during the pandemic, that was a bright spot to pull off so successfully last year. Everyone loved the challenge of something new and different.'

Procter & Gamble tactile bottles

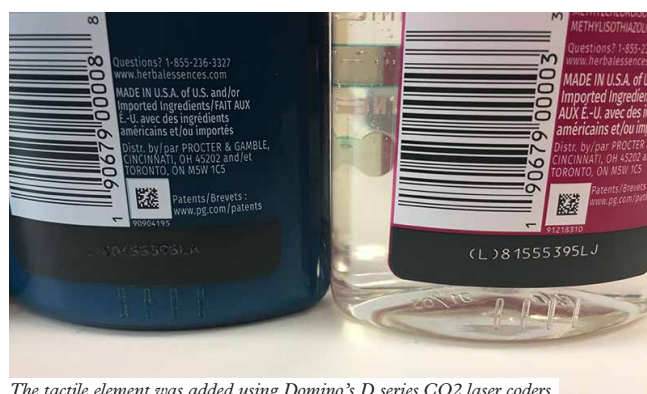
West Side Brewery is not alone in catering to the visually impaired with tactile packaging. Domino recently partnered with Procter & Gamble (P&G) to print tactile symbols on Herbal Essences bio:renew line of shampoo and conditioner bottles.

Scott Scheib, national account manager at Domino Printing, explains that P&G approached Domino because it realized there was an opportunity to improve its social brand responsibility to consumers. To better serve visually impaired customers, the Herbal



Herbal Essences bio:renew line of shampoo and conditioner bottles feature a raised tactile code for the visually impaired

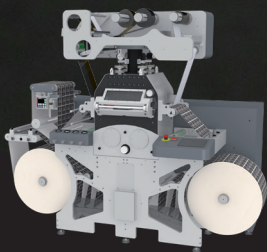
“Packaging with tactile elements, whether braille or tactile symbols, can cater to a new audience and expand marketability”



The tactile element was added using Domino's D series CO2 laser coders

INSTANT ACCESS TO NEW LABEL MARKETS

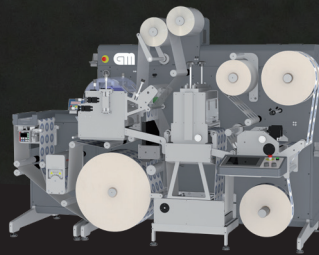
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Steinhauser's award-winning Braille Ale, created for West Side Brewery

Essences' shampoo bottles now feature a raised stripe while the conditioner bottles have raised circles. P&G decided to use symbols, rather than braille, for a variety of reasons, Scheib explains.

'We initially did braille and were successful, but we ultimately did not proceed with braille because of three major reasons. One is because of the speed envelope and the amount of time we had to put the laser energy on the actual bottle; there might not have been enough time to get all of the braille information on there that would give the proper information about conditioner versus shampoo and whatever brand it was. The second reason is that a lot of people can't read braille. The third reason is that there are different characters of braille and different ways to produce braille and with those considered, we couldn't get it strong enough without infringing on the brand information on the label. At that point we transitioned to tactile symbols.'

The placement of the tactile was dependent both on design and the technology of where the brand was already placing coding.

Scheib elaborates: 'On the existing label, there is a code that we produce all the time, a traditional alpha numeric code. We had to figure out a way where we could use laser coating technology (for the tactile symbols), which we already used here to try to recreate it, otherwise we would be introducing additional technologies that could become cumbersome and complex to the packaging application.'

The decision was made to put the tactile in the same area so that the code and tactile symbol could be added simultaneously as the bottles go by.

'You have to have laser coated capability to separate those two codes, do them simultaneously, and with all going on, you have a limited footprint to do that in,' says Scheib.

To accomplish this, Domino used its D series CO2 laser coders. 'Through our testing, CO2 lasers, our D series, was selected because of the overall performance of producing that coated speed.' These symbols are now standardized globally with the Herbal Essences bio:renew line. According to Scheib, 'There is no reason why everything in a rigid plastic isn't a target for tactile, visually impaired functionality.'

This project also needed a special audience to test the effectiveness of the tactile elements. To ensure the new stripes and circles approach would work for consumers, P&G presented the newly coded bottles to the Royal National Institute of Blind People (RNIB) in the UK for consumer testing. The group, comprised of individuals living with partial or complete sight loss, gave many positive reviews and the project was approved.

Scheib explains: 'We live in a world of labeling and coating cost savings, efficiencies and lack of errors. I've been in the industry for 25 years and this is the first time ever that this tactile project was a form of social responsibility, and I don't think you can measure that. P&G wasn't looking for more shelf space; what they were hoping was that all their competition would end up embracing the same level of social responsibility to consumers.'

He echoes Vicki Strull's thoughts: 'Anything that you can put on your packaging that will help the visually impaired will just expand your market space.'

"Your design shouldn't detract from the experience of your broader audience"

Video: Vicki Strull on designing packaging for inclusivity

'When designers are designing any kind of printed piece, whether it is packaging or marketing communications, the most engaging work engages as many senses as possible. Now let's bring that concept to helping this visually impaired community. There are things we can do to enhance the design to communicate better for this community. With the sense of touch, what can we add to a package to increase the awareness of the sense of touch? Typically, if I'm not thinking about this community, I'm adding various touch elements to make it more engaging and memorable. When I'm thinking about it in terms of this community, then I'm adding those elements with a communication lens on.' Watch the full interview with Vicki Strull on L&L's YouTube channel: youtube.com/c/Labelsandlabeling78.



For more information on the Domino and P&G collaboration, go to: www.labelsandlabeling.com/news/new-products/domino-develops-tactile-coded-bottle-pg

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The brand protection market in China

Opportunities for brand protection providers in China are set to increase rapidly in the coming years, writes James Bevan in an exclusive extract from a new Vandagraf report

The worlds of counterfeiting and brand protection have evolved almost beyond recognition over the last couple of years, but China continues to be at the center of it all both in terms of supply and demand.

Fundamental changes are taking place. Some had got underway prior to Covid-19, but have been accelerated by recent events. The impact of Covid-19 has resulted in paradigm shifts in the market: lockdowns, travel restrictions and a variety of important knock-on effects; some permanent and irreversible, some perhaps not.

Given the relentless growth of counterfeiting centered on China, demand for effective brand solutions has not slowed and has probably never been greater. Some kind of tipping point is required – this is largely in the hands of the Chinese themselves as to how hard they decide to push back on counterfeiting in their country in coming years.

Further 'crackdowns' by the Chinese government can act as a stimulus to brand owners and governments to invest further in brand protection on the assumption that incidents of counterfeiting of their products will be acted upon more robustly by the Chinese authorities. China will act in its own best interests, subject to a number of internal drivers as well as external pressure.

Companies that have developed effective integrated brand protection solutions and establish a presence in China (or close by) today will be better placed to meet the future needs of brand owners in China. Companies that do not prepare now and then try to react later may well find it more difficult to gain traction in the Chinese brand protection market.

The China landscape

China accounts for at least 80 percent of the world's internationally traded counterfeits, according to the OECD. But this is only part of the story. In addition, overall sales of Chinese-made counterfeits within China's domestic market are estimated to be of significantly greater value than the counterfeit goods exported to international markets. The internal Chinese market for brand protection, therefore, is potentially huge, albeit subject to position of the Chinese government in relation to counterfeiting in the future.

China has some 1.445 billion people as of mid-2021, representing nearly 20 percent of the world's population. China is set to become the world's number one economy in the future.

The overall value of global counterfeiting is undoubtedly much higher than OECD estimates, which have been based on actual seizures by customs and law enforcement.

Overall figures for global counterfeits need to include those sold in the domestic Chinese market to Chinese consumers: both

counterfeit versions of international brands created in China; and, increasingly, counterfeit versions of fast-growing high-quality Chinese brands, both sold locally and exported worldwide and thus undermining the image of Chinese brands abroad.

The new Vandagraf report argues that homegrown Chinese counterfeiting is increasingly having a negative impact on China itself, as well as the other countries suffering from Chinese exported counterfeits.

“China accounts for at least 80 percent of the world’s internationally traded counterfeits, according to the OECD”

Brand protection technology providers operating in China need to tailor their solutions based on good insights into the Chinese situation.

The huge Chinese market cannot be viewed as homogenous, with both similarities to other cultures and differences that are unique to China. While there are certainly strong national traits, there are also big differences within the Chinese nation and its consumers, with quite different attitudes, behavior, preferences and loyalties, as well as budgets.

A number of dramatic and transformational changes have been taking place in the country over the last decade or so. From simply 'made' in China and created elsewhere, towards 'conceived and created' in China – no longer should China be simply viewed as a low-cost producer for international brands. Homegrown quality Chinese brands are today widely on sale in the local market and increasingly being exported internationally.

For a number of reasons, a new era of Chinese homegrown luxury brands is emerging:

- Continuous improvements in the quality of Chinese products
- Chinese brand owners tend to better understand the fast-changing needs and wants of local consumers (particularly younger demographics)
- Shorter supply chains, local presence, more agility and ability to respond quickly to shifting demands
- Strong patriotic purchasing trend

There are strong Chinese premium brands that are set for further growth, both in the Chinese market and also internationally.

E-commerce and Covid-19

The dramatic rise of e-commerce began prior to Covid-19, but was strongly accelerated by it. There are numerous implications in terms of counterfeiting and for consumers, brand owners and brand protection.

There has been a rapid take up of e-commerce in China, faster than many other countries, and this is resulting in permanent disruptive change. It greatly extends market reach, beyond tier one and two cities and potentially to the entire, connected Chinese population and worldwide. This creates awareness of luxury brands to many consumers that do not have access to authorized bricks and mortar stores. It stimulates new approaches to marketing and promotional initiatives – consumer engagement, analytics, data gathering – through connected packaging. It enables second-hand markets for high-value luxury products and collectibles. And online stores make it easier for illegal counterfeiters to hide and evade punishment.

Nonetheless, the bulk of consumer purchasing is still via offline channels, for the product categories covered in this report.

Millennials (born 1980-1995) and GenZs (born 1995 to mid-early 2000s) have undergone big changes in their consumer habits, becoming the main consumer group of luxury brands.

According to McKinsey, the total consumption of luxury goods by people aged 19 to 30 (i.e. born between 1990 and 2000) in China increased from 45 percent in 2016 to over 50 percent in 2021.

Over the next five years, an estimated 70 percent of the increase in worldwide revenues from luxury goods is forecast to be in China. Platforms like WeChat enable Millennials and GenZs to share content online, while the importance of social media platforms is also growing. The use of smartphones is prevalent.

Chinese Millennials are accustomed to going online to seek products and then to purchase the products in bricks and mortar stores. This type of consumer behavior is known as 'ROPO': research online, purchase offline.

This reinforces the essential nature today for brands (both international and Chinese) of adopting an 'omnichannel' approach.

Since the outbreak of Covid-19 in Wuhan, China, in late 2019, the world has had to adjust, which has significantly affected trends in the trade of counterfeit branded products.

Covid-19 has severely impacted both the supply and demand sides of economies around the world. On the supply side, the entire luxury goods industry shut down for some time. Premium goods brand owners had to close production factories in Europe. Sub-contractors have also been affected. On the demand side, restricted travel heavily impacted Duty Free sales, while in China retailers have also been shut down and consumers have been confined indoors.

In order to limit the spread of Covid-19, China introduced a nationwide lockdown in January 2020, with this resulting most non-essential bricks and mortar retailers being forced to close.

As the situation improved some Chinese retailers began to reopen their stores, although often with reduced operating hours and measures to control the amount of in-store traffic. China was one of the first markets to exit lockdown following the outbreak.

Although restrictions were largely lifted in most cities from May and June 2020, offline sales of luxury products were still down on the same period in the previous year.

As retailers and brands looked to adapt to the situation there was a strong shift online, with e-commerce platforms like JD.com and Tmall seeing spikes in sales.

In addition to expanding their online offer, some manufacturers and retailers also launched cloud-based and live-streaming events as well as developing WeChat communities to help build consumer interest around new branded products.

Pre-Covid, many consumers in China often purchased luxury apparel and footwear while traveling, in some cases travel plans

Brand protection – evolution of the global market

| | 2016 USD millions (estimates) | 2021 USD millions (estimates) | 2026 USD millions (forecast) |
|--|--|-------------------------------------|------------------------------------|
| Global brand protection solutions (offline + online) | 7,010 CAGR: 14% | 13,500 CAGR: 16% | 28,355 |

Source: Vandagraf

“There are strong Chinese premium brands that are set for further growth, both in the Chinese home market and also internationally”

revolving around shopping for these items. Lockdowns have driven dramatic (and sudden) increase in online shopping, greatly facilitating the growth of counterfeiting.

With Chinese consumers forced to stay at home, this benefited e-commerce. Premium brands, both international and Chinese, that have been agile and responded quickly have tended to benefit.

A number of brands saw dynamic growth in 2020 in the Chinese premium markets despite lockdown and travel restrictions, as Chinese consumers switched to purchasing international luxury brands within China rather than overseas while traveling.

Many of the world's economies have suffered declines in GDP due to Covid. Overall, China has weathered the storm better than most, and in terms of GDP growth the impact of Covid is not expected to change the long-term upward trend of China's economy.

The decline is mainly due to lockdown and social distancing norms imposed by various countries and economic slowdown across countries owing to the outbreak and the measures to contain it.

In 2020, the Chinese economy recovered faster than in many countries – nevertheless, some market decline was the norm for the majority of product categories, which showed negative growth during this year in China.

Some Chinese markets continued to show growth in 2020, most notably in beauty and personal care as well as fast fashion and sports footwear.

International transport

In recent years, there has been a major shift from relatively few high-value big shipments by sea to ever increasing volumes of small packages by mail/courier, facilitated by e-commerce, going directly to single domestic and foreign buyers, eliminating middlemen and traceable shipping containers.

This has big ramifications for detection and law enforcement and customs. While risk of detection for sea transport is low, individual cargoes were a big prize. With small packages the risk of detection is higher, but individual losses are small.

Traditionally, law enforcement would typically intercept a shipping container or a warehouse full of counterfeits, whereas counterfeiters are now often shipping a single item at a time out of China. And products ordered online can more readily evade existing counterfeit detection systems.

Two of the more important parties involved with such small



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- Braille printing - Detailed foiling - Metallic doming**



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shipments are national postal authorities, and express and courier services. All with the active support of retail platforms such as Alibaba, Amazon and eBay.

Such packages delivered direct to individual consumers tend to be quite small, easily fitting in bubble wrap letter packets or small cartonboard parcel boxes.

The simplified information that is available through ship manifests and the like, and the supporting role of customs brokers, are absent and generally provided in paper form, and therefore not available electronically.

It is generally only available to customs authorities in destination countries at the time a shipment arrives and is not typically verified, creating broad scope for both legitimate errors as well as fraud.

Efforts are being made by authorities to enhance the use of electronic forms in the post, in order to provide information to customs in destination countries in advance of arrival of shipments, although problems associated with incomplete, misleading, incorrect or fraudulent information would persist.

A growing number of brands (e.g. sportswear) are adapting to the changing retail environment triggered by the rapid rise of e-commerce by moving to DTC (direct to consumer) sales.

In this way, some leading brands are aiming to reduce their reliance on distributors by changing their business models from wholesale to self-operation, cutting out the middleman.

Going forward, bricks and mortar mono-brand and authorized dealer stores will continue to account for over half of sales of premium products in China.

Dynamic market for second-hand luxury goods

This dynamic new marketplace, enabled by e-commerce, has created a whole new requirement and market for product authentication – suddenly, various durable/collectible product categories with value have become more liquid and can be readily traded, such as apparel, footwear (sneakers), women's handbags, watches, jewelry and more. So authentication requirements are increasingly going to need to include provision for change of ownership – unique IDs and proof of authenticity and provenance.

Second-hand markets are still relatively small in 2021 compared to primary markets of new products, but as attitudes towards ownership and sustainability continue to evolve, the momentum of second-hand markets is set to continue to grow rapidly.

Brand owners are finding that they need to take notice of this phenomenon. If they want to maintain some level of brand and



“Over the next five years, an estimated 70 percent of the increase in worldwide revenues from luxury goods is forecast to be in China”

quality control in the secondary market, playing an active role in re-sale is going to be essential. Premium brands can opt for strategic alliances with resellers or attempt to ramp up resale models on their own or supported with third party technology.

The second-hand market, being driven predominantly by young demographics (Millennials and GenZs) is growing four times faster than the primary market and is projected to double in value over the next five years.

There is a self-evident need for reliable means to verify the authenticity of re-sold second-hand luxury, fashion apparel and sportswear products – arguably an even greater need than for the new products marketplace.

Sustainability is a key driver in today's world – again, being driven primarily by younger generations. Circular economies involving extended life and re-use of products is seen as good and this is a factor in the rapid growth of second-hand markets.

Offline versus online

International and Chinese brand owners often suffer from sales of counterfeits both offline and online. Despite dynamic growth of e-commerce and, as a consequence, more online counterfeiting, the majority of consumer purchasing in China (and elsewhere) is still conducted via offline channels, at least for the premium product categories.

So the market for traditional offline brand protection continues to be robust with strong growth potential in China,

although offline distribution channels are at this time being gradually eroded. Note that very different skill sets are required to protect against these totally different types of counterfeiting – some traditional offline brand protection providers have forged links with online brand protection providers.

Consumer empowerment is greatly diminished if the authenticity of a branded product cannot be verified prior to purchase, whether via physical examination by the consumer or authentication technology. And herein lies a huge problem and fundamental weakness in relation to online sales.

But this is not standing in the way of huge growth in e-commerce of brand products that is resulting in huge number of dissatisfied customers around the world, including – and perhaps especially – within China itself.

Traditionally, with 'bricks and mortar' offline shopping, consumer product verification prior to purchase was the norm and this is clearly highly preferable. Not only does pre-purchase verification provide reassurance to the consumer prior to owning that product, it also removes the anxiety and anger that would naturally accompany the discovery of a counterfeit variant at a later stage. If such a discovery can occur prior to purchase, then the consumer can simply elect not to purchase the product.

Post-purchase verification, on the other hand, which is the norm for online shopping, means that if the product turns out not to be authentic then the consumer is essentially burdened with the prospect

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Areas of opportunity

Addressable market for brand protection:

- Top four cities
- Tier one Chinese cities (11 cities)
- Tier two Chinese cities (32 cities)
- 20 percent of population – 287 million inhabitants
- 77 percent of total expenditure on premium products

Currently viewed as being beyond the reach of effective brand protection measures:

- Tier three Chinese cities and beyond (2,206 cities)
- 80 percent of population
- 23 percent of total expenditure on premium products

of taking steps to prove that the product is not what it should be, and get money back. This process is not always straightforward as major platforms like Amazon and Alibaba primarily operate with third party suppliers (of varying respectability). A further benefit to pre-purchase verification is that it can significantly enhance detection rates for counterfeits and in a timely way.

It is not unreasonable to assume that consumers, and even retailers, who are motivated, will act to authenticate a product in the retail environment. The motivator for verification can be a loyalty program for which the product authentication is a secondary benefit. Either way, a large body of empowered consumers represents a powerful force for counterfeit detection.

Hotspots for counterfeiting

Within the frame of premium products as covered in this report, a number of 'hotspot' product categories have been identified as showing a very high rate of counterfeiting in China – at an estimated 40-50 percent or even higher (certainly higher than 50 percent across tier three cities and beyond): fast fashion – apparel, sneakers, sunglasses, high-end watches, and luxury luggage and women's handbags.

Such is the high profitability and huge volumes associated with such look-alike designer fast fashion items, that Chinese manufacturers tend to continue despite the clear evidence of breach of original designer and brand owner IP rights. The inevitable and increasing levels of legal actions against them appears to be considered simply to be the cost of doing business. As governments raise the bar in terms of legal consequences such as even heavier fines and the threat of imprisonment for perpetrators, it may be possible to rein in this kind of activity – but there is not much to suggest that this is happening yet.

Some recent estimates have put losses from counterfeit premium women's handbags at around 20-25 billion USD, which comes to 40-50 percent of the global market. Sales of women's handbags continue to be robust, with the more classic designs in particular holding their value and so being viewed by consumers as investments as well as fine luxury objects to be used.

Opportunities for brand protection in China

Chinese counterfeiters are highly resourceful and often well-funded. In order to build a realistic defense against counterfeiting, sophisticated brand protection strategies – typically comprising a combination layered first, second and third level devices and features – are generally more effective in deterring counterfeiting of

branded products in the Chinese market and indeed elsewhere.

China is the epicenter of world counterfeiting. Solution providers need to be mindful of the risk of their own proprietary technologies themselves being copied or compromised when operating in the Chinese market.

Selection of 'fit-for-purpose' brand protection technology in China needs careful consideration given this huge country's uniqueness and importance in the world of counterfeit branded products. This aspect has been analyzed in detail in the new Vandagraf report.

Demand for effective brand protection solutions has not slowed and indeed has never been greater. As can be seen from the table, the growth of the global market for brand protection, already well into double digits at an estimated CAGR of 14 percent, is forecast to accelerate through to 2026.

In 2021 label converters have continued to be the most widely used carrier in 'offline' brand protection and this reflects the fact that the label format is such a versatile carrier for security features. Some labels are discarded after the point-of-sale; others are used widely for permanent life-time solutions. The use of packaging materials as a carrier for brand protection devices is growing.

As homegrown Chinese brands continue to emerge and gain more traction, so brand protection is likely to become an increasingly pressing priority for Chinese brands selling in the domestic market and increasingly for international sales.

Best estimates put the potential market for brand protection solutions in China at around 5 percent of the global market for brand protection in the near term up to 2026, with substantial further growth potential thereafter.

“Estimates put losses from counterfeit premium handbags at around 20-25 billion USD – 40-50 percent of the global market”

Historically, in China (and indeed elsewhere) there has tended to be a lack of power in the hands of the courts to deal sufficiently robustly with crimes involving counterfeiting. Infringers were usually subject only to fines, not imprisonment – and without imprisonment as a deterrent, the industry is likely to remain entrenched. But there are now increasing indications that Chinese government is starting to crack down more on the huge problem of counterfeiters operating in the country. More recently, China's legal system – particularly its civil courts – has made major strides in enforcing trademark rights.

There have been various initiatives in China, both governmental and private sector, and momentum is gathering, for example: China's new e-commerce law – Online Market Regulation; and the US-China 2020 Phase One Trade Deal – Combatting Counterfeiting.

Opportunities for brand protection providers across a broad range of the vertical markets and product types in China have been identified in the report. China's major tier one cities may be seen as relatively mature in an international sense, albeit with high levels of counterfeiting. Meanwhile, counterfeiting in tier two cities is higher than in tier one. In tier three cities and rural areas counterfeiting tends to be very widespread and effective deterrence is seen as beyond reach at this time. Tier three cities and beyond are simply not sufficiently developed or aware, for brand owners to attempt and type of structured brand protection.



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UV-LED DELIVERS ON ITS PROMISES

Backed by almost 20 years of development, UV-LED inks and curing systems are no longer a 'bleeding edge' technology, instead, as Jay Tharp explains, they are now the new normal for digital, screen, narrow web and flexo printing

Introduced in the early years of the 21st Century, UV-LED inks came to market with all kinds of promises to help make life easier for printers and allow them to achieve stunning output at lower costs than other more traditional inks. Fast-forward 20 years to the current day and UV-LED inks are now being put to work on all sorts of print applications, delivering exactly what developers promised, with a few other benefits to boot.

INCREASED FLEXIBILITY

Nazdar Ink Technologies was among the early adopters of this technology and has carefully developed its UV-LED inks products over the years to ensure they are meeting the ever-changing demand of print companies and their customers. Such is the flexibility of UV-LED ink technology that products are available for use on digital inkjet machines, screen presses, narrow web printers and within flexo printing. Customers using any of these print technologies in combination with a properly integrated UV-LED curing system can be assured of a high level of output every time.

Over the years, the flexibility of UV-LED inks has continued to improve, to the point where these inks can not only be run on a range of printing presses, but also on a huge selection of substrates and at increasingly faster press speeds. In addition, UV-LED curing systems are now available with continuous length lamp head assemblies up to 1.7m long. As such, this opens their use to all sorts of print applications.

Nazdar's commitment to maintaining this level of flexibility – and indeed the quality of its inks – means it continuously tests its

products to ensure their durability, shelf-life, elongation and forming across all forms of printing technology.

EXPANDING PRODUCT OPTIONS

Outside of Nazdar's own specialist ink development facilities, some of the biggest names in print manufacturing have also embraced UV-LED, with the likes of Roland DG, EFI, Agfa, Mimaki, Ricoh, Epson and Canon all placing the technology among their key focus areas.

Meanwhile, the likes of Fujifilm, Coates, Polymeric and Sun Chemical now offer UV-LED products for digital inkjet, graphic screen and narrow web, while Flint Ink has products for digital inkjet and narrow web.

INVESTMENT AT GEW

According to Jennifer Heathcote, Business Development Manager at GEW (EC) Limited, a supplier of UV curing systems for over 30 years: "In terms of equipment, GEW has made significant investments in its LED product portfolio and manufacturing capabilities. This has enabled us to satisfy increasing market demand to the point that we are now shipping almost one UV-LED lamp head for every two mercury vapour lamp heads."

In addition, GEW always supplies complete UV-LED curing solutions specifically designed for ease of integration onto printers. For those new to LED and not fully convinced of the technology's capabilities, Arc/LED hybrid solutions, which consist of a cassette style lamp head and universal power supply, allow printers to quickly and easily swap between LED and mercury cassettes. This means printers can

transition to LED at a pace that suits their need and comfort.

This level of commitment from the leading minds in print goes to show we can expect even more exciting and innovative announcements as work to improve these inks continues.

PIN CURING

In a world of variables one technology that has helped gain control of optimisation was UV-LED pin curing, believes Josh Lutz, Market Segment Manager – UV Inkjet at Nazdar. He explains: "This has created benefits in many ways such as control of

"Over the years, the flexibility of UV-LED inks has continued to improve"

dot gain, allowing visual effects of matte/gloss appearance, building structures or 3D effects, and altering ink interactions to a degree.

"We see the use of pin curing in all UV inkjet processes and see great value in high-speed inline processes such as flexo/inkjet hybrid, direct-to-shape, product print and more. We are excited to see the continuous innovation of inkjet, mixed technologies, and the use of LED in general."

Glenn Shull, Portfolio Manager, Graphic Inkjet Equipment and Ink at Nazdar, adds: "Heat has been [the] barrier to widespread adoption of UV curing across the many platforms in the printing industry. UV-LED reduced a percentage of that heat, breaking through that barrier into most printing systems.



GEW (EC) Limited's Cassette Style LeoLED Curing System for Web Applications



Phoseon FireJet ONE High-powered 20W/cm² air-cooled curing system

"Widespread adoption brought technology advancements that have made UV-LED the industry standard. It has it all: low energy consumption; lower heat; and speed for the continual improvements to printheads and ink."

As demand continues to grow, Nazdar will work with top UV-LED OEM manufacturers to optimise print production performance for its customers.

ADVANTAGES OF LED INKS

Michael Beck, VP of Worldwide Sales at Phoseon Technology, says "Phoseon pioneered UV-LED systems and works closely with companies like Nazdar to perfect the formulations and allow customers to realise the huge advantages of a high-performance UV-LED system."

UV-LED inks offer many benefits to the process when coupled with the properly engineered LED lamps.

"For flexo printing, stronger and deeper colours can be [achieved] due to the ability of LED to penetrate heavier ink deposits," he said. "Opaque whites are more opaque, metallic colours offer improved brilliance and you can now run fluorescent colours without fear of colour shift on press from the UV light. The low heat load of a UV-LED system also enables heat sensitive film applications including shrink sleeves."

So where does this place UV-LED inks now and what else can we expect from the market? Since becoming more mainstream, the pricing for both the equipment and inks has become much more affordable, which in turn makes return on investment much easier to recoup for users.

Jennifer Heathcote continues: "GEW is leveraging recent technical innovations and economies of scale to supply many UV-LED

curing systems at capital costs that are often less than equivalent mercury vapor systems. When combined with a lower cost of operation and increased productivity, it is easy to see why UV-LED curing has become the preferred choice for many in the printing industry."

SUSTAINABILITY

There are also the many environmental benefits of using UV-LED, in that this technology uses a lot less energy than other printing methods and the inks are free of solvents, meaning they don't release any VOCs, making them much more friendly to the planet.

Michael Beck concurs that technology in this market is driving change, saying UV-LED is dominant in several printing and industrial curing markets. UV-LED is expected to surpass mercury in all segments by 2025, offering a much greener solution to printers and their customers.

"UV LED is expected to surpass mercury in all segments by 2025"

"Sustainability is a key initiative for major global brands and their sustainability efforts will influence the business for the converters that produce for them," he said. "Mercury is toxic and bulb disposal creates a waste stream. LED curing systems typically do the same work or more while using less than one-half of the energy. We believe that the only sustainable UV curing option is LED."

Aside from the clear environmental benefits, Michael Beck says there are many more advantages with UV-LED including cost and performance benefits. "The lifetime cost of LED curing is significantly less than

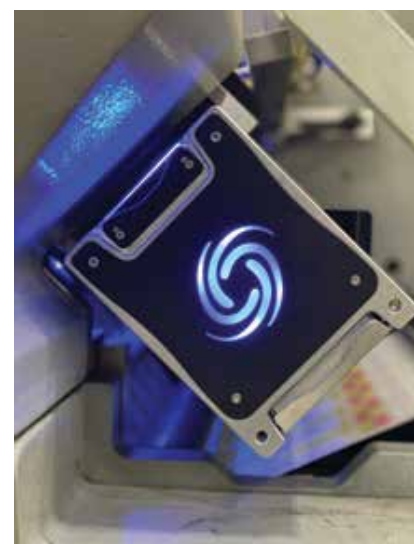
mercury which requires regular replacement of bulbs, filters and reflectors. Eliminating consumable replacements by using LED results in higher press utilisation, more substrate utilisation and improved production yield. The bottom line is more profit for the converter." He qualified this by adding, "The value propositions above are highly dependent on a reliable, stable, and long-life UV-LED lamp design. The popularity of UV-LED has attracted many followers so choose wisely."

Printers using UV-LED inks can communicate these benefits to their own customers, and in a world where the environment is now a critical consideration when it comes to any sort of work, this could be the difference between printers winning new contracts or indeed seeing them awarded to their greener-minded rivals.

Michael Beck concludes: "The printing industry has adopted LED curing across many market segments. Digital inkjet printing was the first segment to incorporate LED and Nazdar was one of the early adopters. Screen, offset, and flexographic presses have been incorporating LED for years and that pace is increasing as the portfolio of LED inks, coatings, and adhesives continues to quickly grow."

High quality, reliable, cost-effective and environmentally friendly, UV-LED inks are now the new normal for printers succeeding in all sorts of markets. ■

Jay Tharp is Director of Marketing at Nazdar



Phoseon Nexus ONE air-cooled narrow-web flexo lamp system

Further information:
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 tel: +1 913 422 1888
 email: jtharp@nazdar.com
 web: www.nazdar.com

Label your sustainability claims

Investment in interactive labels will be crucial to building a regenerative retail economy and meeting retailers' sustainability goals.
Piotr Wnuk reports

Ahead of the 2021 United Nations Climate Change Conference planned for November in the UK, Avery Dennison has teamed up with forecasting consultancy The Future Laboratory to publish a new report: Regenerative Retail Economy.

The information was released when the UN Framework Convention on Climate Change challenged retailers to ensure that 20 percent of the retail industry by revenue is committed to net-zero by 2023 and that the entire sector reaches net-zero by 2050 at the latest.

The report combines expert interviews with consumer insight and identifies emerging trends and attitudes that will drive transformation in the decade ahead. It highlights the technologies which will fundamentally change how retail and consumer brands do business as well as new approaches to e-commerce and omnichannel retailing.

According to Tyler Chaff, global sustainability manager at Avery Dennison SmartTrack, now is a time of enormous disruption as the retail sector looks to recover from the Covid-19 pandemic and face the challenges of climate change.

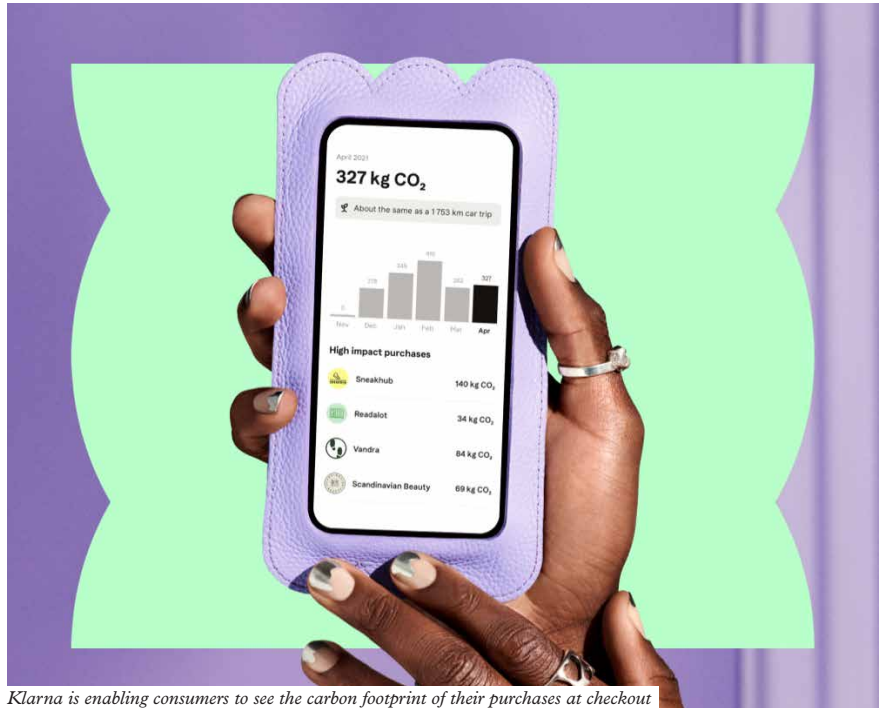
'This report lays out the bold actions required to help retailers transition to net-zero and a regenerative retail economy,' says Chaff. 'In a regenerative retail economy, retailers, manufacturers, suppliers, brands and consumers will each take responsibility and ownership over the collective need for a more sustainable future.'

The report includes three predictions for the future of retail; exploring the importance of pro-planet packaging, openly and transparently communicating environmental impact, and radical collaboration which calls not only on governments to move the world to net-zero carbon emissions, but also on business and civil society to do the same.

The report highlights that technological investment will be crucial to building a new retail economy as retailers move towards regenerative systems.

Research shows that 77 percent of business leaders listed environmental sensors and IoT as essential in meeting their sustainability goals, with more than one-fifth claiming to have accelerated their digitalization plans by three years.

'The combination of materials and digital solutions will play a critical role in building a regenerative retail economy,' says Rob

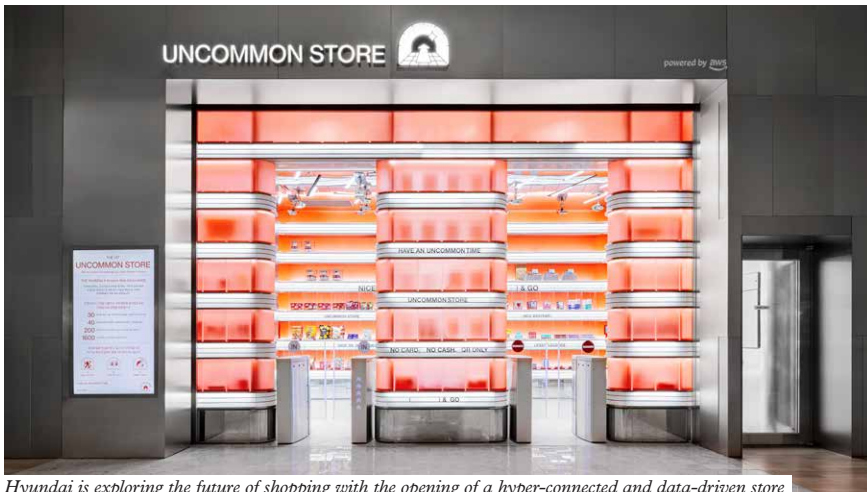


Klarna is enabling consumers to see the carbon footprint of their purchases at checkout

“The most successful retailers will be those that connect with consumers in new ways by leaning on their digital, omnichannel and in-store technology ambitions”



Spruce refillable cleaning products use minimal and clean brand labeling to communicate their low environmental impact



Hyundai is exploring the future of shopping with the opening of a hyper-connected and data-driven store

Avery Dennison qualifies for How2Recycle label

Avery Dennison has become the first pre-qualified intelligent labels provider to receive the How2Recycle label for RFID paper hang tags, recognizing they are as easy to recycle as many of the products they appear on.

The How2Recycle label was created to provide consistent and transparent on-package recycling information to consumers in North America and involves a coalition of brands that want their packaging to be recycled and are empowering consumers through intelligent packaging labels. How2Recycle is a part of Green Blue, an independent environmental non-profit organization.

The label has been assigned based on several factors that How2Recycle considers, including applicable law, access to recycling, sortation, reprocessing, and end markets.

This development follows many years of research within Avery Dennison SmartTrack to develop a unique combination of materials, adhesives, and inlay construction to enable RFID labels to be recycled alongside any other residential recycling stream, meaning they can be transformed with any other paper-based materials.

'This recognition follows many years of R&D to develop the right materials and design to ensure that our labels are as easy to recycle as many of the products they appear on,' said Tyler Chaff, manager of global sustainability at Avery Dennison SmartTrack. 'We are proud to be the first intelligent labels provider to meet the exacting requirements of How2Recycle and look forward to receiving confirmation from similar bodies globally.'

Green in 't Woot, marketing director for paper and film at Avery Dennison Label and Packaging Materials.

'This means recovering and recycling materials at a faster rate than we are using them and creating greener last-mile solutions for packaging, shipping and returns as e-commerce grows. It means digitizing the supply chain so retailers can better understand their inefficiencies and waste to create more circular business models. And it means not only promising to preserve the planet but also proactively contributing to make the natural world a better place for all its inhabitants.'

Tackling greenwashing

It's easy for brand owners and retailers to make sustainability claims and promises. In June 2021, Changing Markets Foundation published a Synthetics Anonymous report assessing brands across the spheres of fast fashion, luxury fashion and online retailing based on their sustainability claims.

Across all assessed brands, 39 percent of products came with sustainability-related claims such as 'recycled', 'eco', 'low-impact', or simply 'sustainable'. The Foundation assessed whether these claims stood up against the Competition and Markets Authority's (CMA) new guidelines on avoiding greenwashing – 59 percent did not.

From 2009 to 2010, environmental marketing firm Terr Choice found 'green' labeling increased a whopping 73 percent. In 2010, the company also found that 95 percent of 'green' products are greenwashed. On the outside, the products looked environmentally friendly, but in truth they were not as 'green' as they claimed to be.

Green Claims Code, new guidance published by the UK Government's Competition and Markets Authority, aims to tackle the ongoing problem of greenwashing by applying six principles to which all sustainability claims must adhere.

The changes cover on-pack, off-pack

“Impact is the bedrock of brand purpose, and without proof that you have a positive impact – demonstrated and disclosed credibly – your brand purpose will become meaningless”

and digital communications, with the intention to level the sustainability playing field, increase consumer protection and rebuild trust.

'Across the retail industry, we've seen sustainability take center stage even in the tough Covid-19 conditions, and naturally packaging dominates much of this discussion. With greenwashing and misleading claims, the umbrella term "sustainability" has lost any edge or marketing punch – it's just white noise to consumers now. Shoppers want more information and are prepared to dig deeper to understand the true nature and credentials of a product,' says Joanna Stephenson, managing director at PHD Marketing.

More consumers are seeking retailers who not only align with their values but have the proof to back up their claims. Consumers discover brands in new ways and seek convenience, transparency and new experiences to guide their shopping decisions.

Covid-19 is accelerating this trend, catapulting consumer experiences and consumers' expectations years into the future.

Technology in action

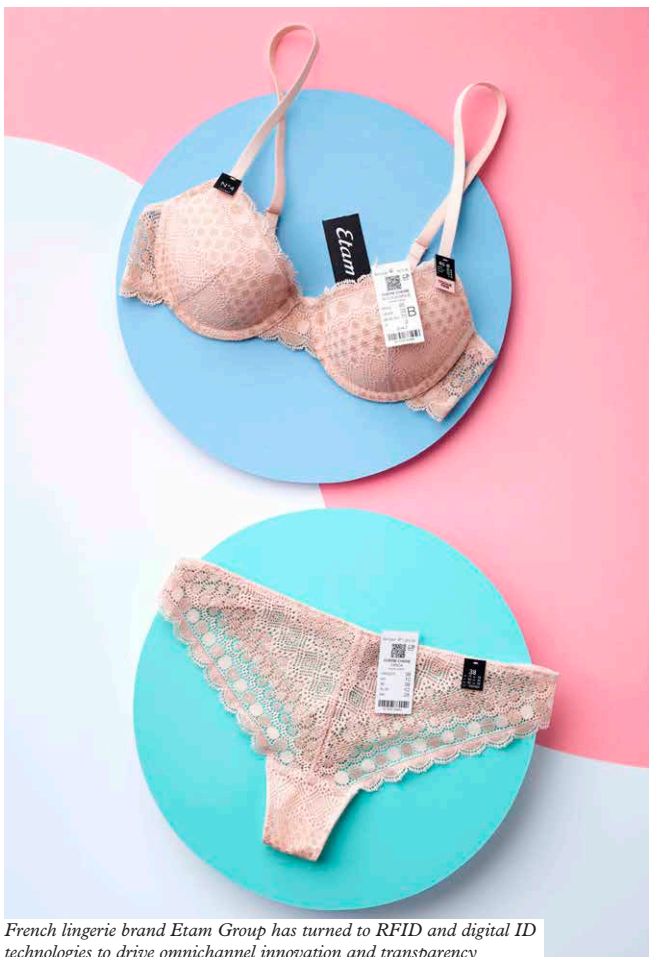
As the environmental impact becomes a metric by which retailers are judged, they will need to offer transparency and traceability and back up sustainability claims with evidence. Retailers will calculate and share their impact with consumers, and technology will allow consumers access to end-to-end transparency across the supply chain.

'Impact is the bedrock of brand purpose, and without proof that you have a positive impact – demonstrated and disclosed credibly – your brand purpose will become meaningless,' says Jessi Baker, founder of Provenance, a digital platform that enables brands to track the journey of their products.



Sustainable shopping start-up Olive consolidates multiple online purchases into a single weekly delivery with reusable packaging

“Shoppers want more information and are prepared to dig deeper to understand the true nature and credentials of a product”



French lingerie brand Etam Group has turned to RFID and digital ID technologies to drive omnichannel innovation and transparency

Provenance’s Transparency Framework helps companies evidence their marketing claims and avoid greenwashing, turning supply chain data into consumer-facing information.

Working with Provenance, New Zealand dairy brand Anchor added QR codes to its milk bottles to verify its sustainability claims, from its bio-based bottle to its grass-fed cows. Each claim Anchor makes is backed up by third-party verification.

Meanwhile, the recently-launched Higgs Index transparency program for apparel brands aims to be the first holistic system for communicating sustainability performance across a product’s lifecycle. In this initial phase, it will focus on environmental impact and aims by 2022 to include social data as well, showcasing the expanding definition of sustainability.

Having proof of impact will become the new standard for retailers looking to deepen their sustainability story. Ultimately, by making the work traceable and transparent, retailers will benefit from long-lasting consumer trust.

‘Those that gain trust through deeper levels of transparency will be better off than focusing on one-off activations,’ says Avery Dennison’s Chaff. ‘An aspect of companies being verified as sustainable means that I, as a consumer, don’t have to do the work. I can trust the company I’m buying from has already done it, and that’s more convenient.’

Technology such as RFID, digital labels and the connected product cloud-enabled supply chain offer visibility and better inventory management.

One of the leading lingerie brands in France, Etam Group, has turned to RFID and digital ID technologies to drive omnichannel innovation and transparency while offering a best-in-class consumer experience and boost to its sustainability objectives.

‘The functionality offered by Avery Dennison SmartTrack’s products is critical to our drive to remain the lingerie market leader in terms of consumer experience and our omnichannel strategy,’ says Benjamin Durand-Serving, COO at Etam Group.

Today, the goal of this business approach is to offer what Etam refers to as ‘the best-in-class retail and omnichannel experience in the lingerie segment’.

To achieve this, Etam is exclusively deploying digital ID technology from Avery Dennison SmartTrack. This includes RFID and QR-coded hangtags to digitize the whole value chain and processes, along with vendor shipments, store inventory accuracy, self-check-outs, returns or reverse logistics, e-commerce, and the try-at-home initiative.

The deployment of RFID is critical to Etam’s transparency project. Clients can scan the product label with their smartphone to get instant access to short videos that provide insights into the factory where the item was produced. This further supports Etam’s sustainability efforts and broadens the consumer experience beyond what many of its competitors can offer, including big global brands.

By the end of 2021, Etam plans to extend its transparency program to every item sold, which is a pioneering breakthrough within the textile industry.

‘As demand signals across channels become harder to predict, there have also been significant impacts on product, retail store, factory, and logistics services availability,’ says Uwe Hennig, market development director for food and apparel at Avery Dennison SmartTrack.

‘The most successful retailers will be those that connect with consumers in new ways by leaning on their digital, omnichannel, and in-store technology ambitions.’



To read the free Regenerative Retail Economy report by Avery Dennison and The Future Laboratory, go to: <https://link.labelsandlabeling.com/avery>

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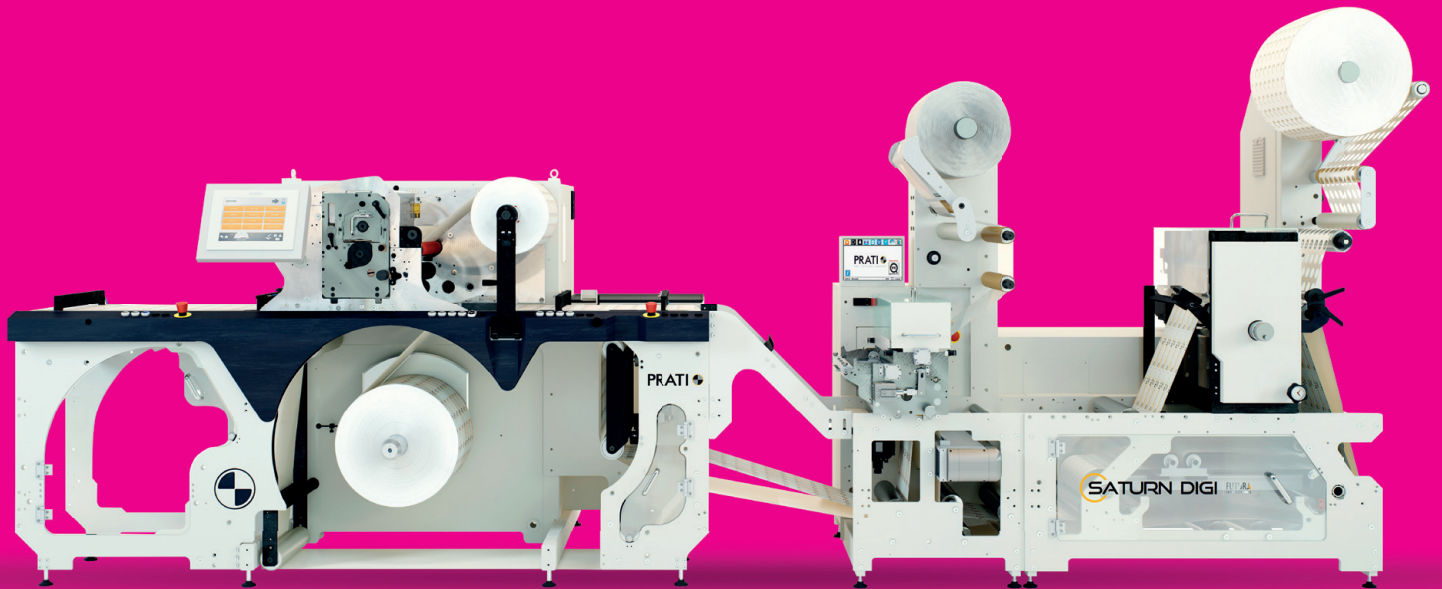
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Actega's Ecoleaf completes beta testing

The EcoLeaf applicator machine, set for commercial availability in the US in 2022

As EcoLeaf concludes its beta phase, Jordan Hart reports the updates and feedback from the technology

From its inception with Landa to its fulfillment with Actega, EcoLeaf is a technology five years in the making. L&L's Piotr Wnuk covered the start of beta testing for EcoLeaf technology back in June 2020 and now L&L investigates what progress has been made and the initial feedback from early adopters.

The concept of EcoLeaf, originally called nano-metallography, was introduced at drupa in 2016 by Benny Landa. The highlights of this presentation included that this is a zero-waste technology (because a donor roll bonds to a trigger image with no wasted material), the metallization would be microwavable, and it can be paired with almost any printing process.

In 2017, Altana acquired the metallography technology from Landa Labs, taking responsibility for the remaining development and engineering work. This transfer was not unprecedented. In 2014, Altana and Landa Corporation concluded an equity financing agreement under which Altana pledged to invest 100 million EUR (135 million USD) for a minority stake in Landa Digital Printing. While Landa Labs was not included in the transaction, this investment cemented the relationship between Altana and Landa.

Actega is Altana's division for packaging and printing, and within Actega the company formed its metal print division in 2017 after the acquisition of nano-metallography. The company rebranded the technology as Eco-Leaf and began beta testing in 2020.

Dario Urbinati, then the chief sales and marketing officer at Actega Metal Print, gave a presentation in February 2021 for FuturePrint's virtual conference where he detailed that in spring 2021 Actega's beta program had six installations in the EU. After adapting the technology to reflect feedback from beta testers, Actega plans to have commercial availability in the EU by Q3 2021. Commercial availability in the US is set to follow in 2022.

Alongside the beta program, Actega has been developing EcoLeaf Digital. According to the company's September 2020 newsletter, this is a modular printbar equipped with Ricoh Gen 5 inkjet heads

“While there are exciting new projects for EcoLeaf, conventional hot foiling is still needed for many applications”

which will allow digital metallization for print widths from 330 to 520mm with 1,200 DPI resolution. According to the company, 'the print bar and the EcoLeaf Metallization Unit can be installed into any conventional, hybrid or digital printing equipment.' The first EcoLeaf Digital system has been installed on an A B Graphic web transport system in Actega's Competence Centre in Lehrte, Germany.

German print specialist Kolbe-Coloco Spezialdruck was the first company to invest in EcoLeaf in March 2020 and completed its beta program in spring 2021. Actega used the company's feedback to improve the EcoLeaf unit. 'All new EcoLeaf systems now feature a cover that offers user friendly functionality, superior durability and a style that reflects the cutting-edge nature of the technology,' says Actega.

EcoLeaf units are now being sold by A B Graphic International (ABG) in Europe, either installed on Digicon Series 3 digital finishing machines or retrofitted to existing presses in the field. ABG will handle direct sales, marketing and customer service for EcoLeaf in the EU and UK.

German printer Vollherbst was the first company to purchase an Ecoleaf Unit from ABG after the partnership with Actega was announced. The EcoLeaf unit was installed on the company's A B Graphic Digicon Series 3 converting machine. L&L sat down with Matthias Vollherbst, managing owner at Vollherbst, to get his feedback as an early adaptor of EcoLeaf.

Interview with Vollherbst

L&L: What types of products are you decorating with EcoLeaf?

MV: We decided to closely collaborate with our key clients during EcoLeaf's beta phase in order to allow the highest transparency, direct feedback and a high speed of learning. These close contacts of ours mainly operate in the wine and spirits sector. While to date we have been using EcoLeaf for wines and spirits, we are not limited to it.

L&L: You previously estimated a return on investment in six months. Has that proven to be the case?

MV: My statement regarding a six-month return on investment never referred only to the financial benefits. It is based on a wider view on investing. As an organization, we learned an incredible amount from the EcoLeaf beta phase and were able to build new customer relationships. In particular, the learning payoff we have seen after six months makes EcoLeaf a good investment for us. For me, as an entrepreneur with a long-term perspective, these are the real benefits from investing in such a new technology. Financially, the investment will pay off by mid-2022, when major projects that are currently starting up will be realized.

L&L: What was the learning curve for using this technology?

MV: Our team, and especially our machine crew, were motivated to the hilt at the beginning. They were happy to finally have a new challenge to dig deep into. That is an essential part of our corporate culture. Accordingly, the first successful implementations were also available very quickly. Of course, with the first hurdles came the first set of dampers. Learning that there are still one or two limitations to using EcoLeaf was difficult, because our operators have the expectation and willingness to always deliver an absolutely perfect result.

At the same time, we knew that this process is completely normal and the Actega team also quickly had a solution for every problem. Today we know that a new technology needs some adjustments and workarounds. We also got confirmation once again that while there are exciting new projects for EcoLeaf, conventional hot foiling is still needed for many, many applications. The one-to-one comparison is just completely wrong. It is just a completely different technology and application.

L&L: What machine are you using to print the trigger image?

MV: In the wine and spirits segment, we work almost exclusively with very open-pore uncoated papers. We have found that we achieve the best results there when we apply the trigger image with the screen unit on our A B Graphic Digicon.

L&L: What feedback are you receiving from your clients regarding EcoLeaf?

MV: We are seeing more and more customers asking for alternative, sustainable solutions for their labels every day. EcoLeaf is one of the solutions we offer them in this regard – among many others. Customers understand the benefits very clearly and find the new technology very exciting. But they also understand that there is a different look and feel than the one they know from hot foil and embossing. This is where we do important educational and advisory work, because there are simply projects where we have to continue conventional finishing – for sustainability and visual reasons – and in other projects you can go for new technologies like EcoLeaf. But there is no one-size-fits-all solution, which is why it is important to take a highly individualized approach to each customer project.

L&L: Can you talk about the sustainability benefits?

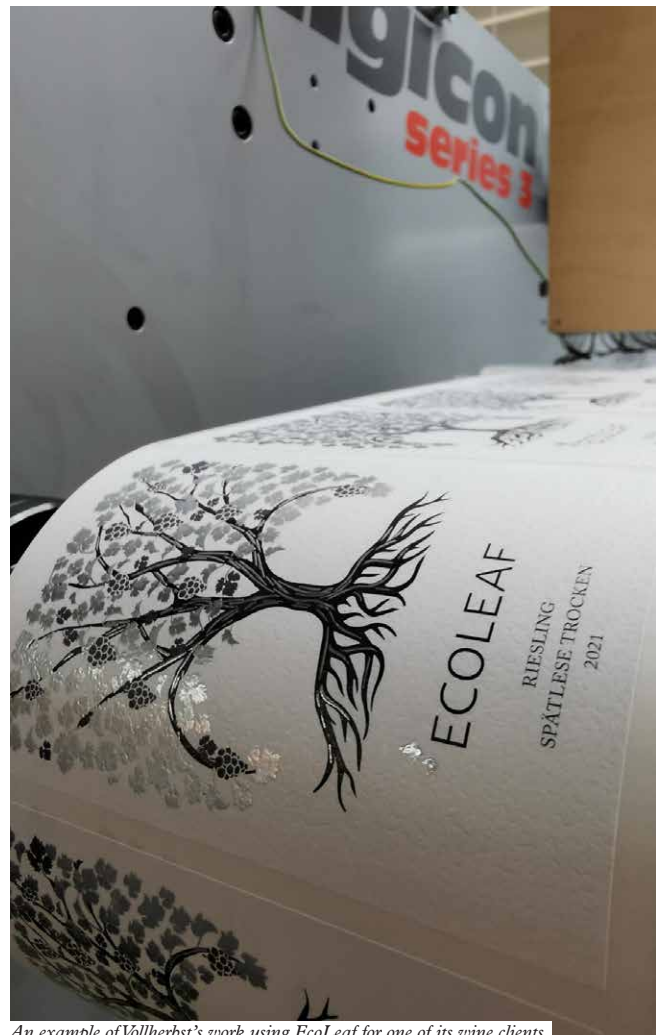
MV: EcoLeaf's sustainability principle is clearly based on avoiding waste. After all, the idea is to metallize with pinpoint accuracy and not produce waste resulting from the fact that full-surface metallization

Sustainability at Vollherbst

German converter Vollherbst chose to invest in EcoLeaf largely because of the sustainability benefits, but EcoLeaf is not the company's only sustainability effort. Vollherbst has been using solar energy for over a decade and recently switched to using green electricity. The company also digitalized many of its processes to avoid unnecessary print outs. Vollherbst has also teamed up with various partners to develop alternative processes for more resource-efficient print finishing, such as EcoLeaf.

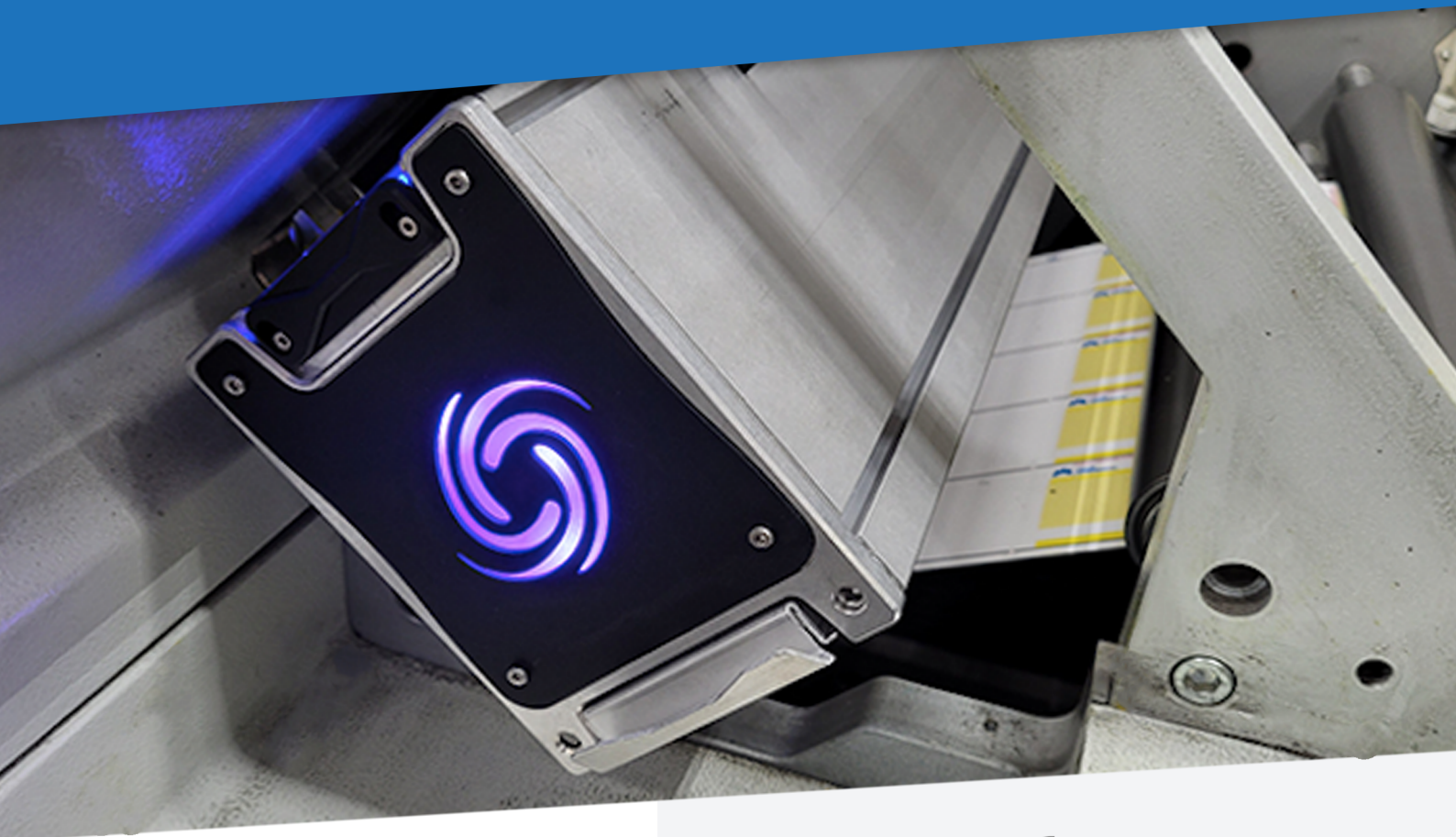
Stefan Vollherbst, chief resource manager at Vollherbst, says: 'Sustainability is one of the most important issues of the future for us. We're part of the wine, spirit and leisure industries. Our clients, such as winemakers and beekeepers, work directly with nature. As their label manufacturers, we feel equally committed to nature and take responsibility for people and the environment.' The company's efforts resulted in Vollherbst winning the sustainability category of the 2020 Printer of the Year competition.

“Sustainability has to be thought of in an absolutely holistic way and doesn't just start with the printer, but already with the designer”



An example of Vollherbst's work using EcoLeaf for one of its wine clients

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The zero-waste technology, originally called nano-metallography, was introduced at drupa in 2016 by Benny Landa

“We learned that it’s better to match each job repeat length. So, now all new EcoLeaf units are equipped with variable size donor rolls, ensuring that all customer’s job sizes can be matched”

is used for the finishing process, of which perhaps 10-20 percent is necessary for the design. This sounds very complicated, but the principle becomes very clear in the case of a gold frame, for example. For a gold frame around a label, a hot or cold foil has to be placed over the complete label and the inner part is waste.

With EcoLeaf, we can only metallize the gold frame and do not produce this waste in the inner area. Here we see massive sustainability benefits by using EcoLeaf. In other cases and for other designs, however, other technologies may have similar or better sustainability benefits. It all depends on the design and the metallization set-up. You can see from this, that sustainability has to be thought of in an absolutely holistic way and doesn’t just start with the printer, but already with the designer.

Interview with Actega Metal Print

L&L also sat down with Paolo Grasso, sales director for Actega Metal Print, to see what insights the company gathered from the beta testing process.

L&L: Could you comment on how the beta testing went?

PG: Beta testing has gone very well. As you know, one of our customers [Kolbe-Coloco

Spezialdruck] has already completed the process and is producing high quality, saleable commercial work that their customers love. And importantly, our other beta customers are also providing very positive comments, as well as constructive feedback that we use to further refine the system – this is the purpose of the beta process, and it has been invaluable. We head towards commercialization and series ramp-up in great shape, but as you would expect, we still have lots of work still to do.

L&L: As the beta testing process is completed, what comes next for EcoLeaf?

PG: While Kolbe-Coloco has completed its beta program, we have many other customers that are still in the process. But as you suggest, we are making great progress and as is the nature of R&D teams across the Actega business, we are constantly developing new innovations to either extend the capabilities of EcoLeaf, or other exciting things to come. For any business like us, but especially in the graphic arts, it’s so important that we continue to innovate to ensure that our customers have the sharpest competitive edge and the most sustainable solutions available.

L&L: Are you still on track for commercial availability in the US in 2022?

PG: Yes, we are. But as you know, nothing is for certain right now as we all continue to manage the impact of the pandemic.

L&L: Why did you choose ABG as your partner for EcoLeaf?

PG: ABG is a great partner for us. They have over 65 years of print finishing expertise in the label industry, with some 11,000 product installations and 2,500 customers. They not only see a big opportunity with EcoLeaf, but they share our vision for a more sustainable print market too – so there are some great synergies between us.

L&L: What are some of the changes being made to the technology as a result of the beta testing feedback?

PG: Well, there were many. However, one of the key learnings we made was that it’s better to match each job repeat length. So, now all new EcoLeaf units are equipped with variable size donor rolls, ensuring that all customer’s job sizes can be matched – this also makes the system even more user-friendly. Of course, there will be other changes and innovations that we make over the coming months and years, as our aim is to continually evolve the solution and enable it to support different market segments in the future.



To learn more about EcoLeaf, visit: www.actega.com/us/en/brands_EcoLeaf



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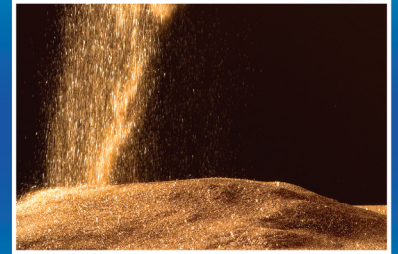
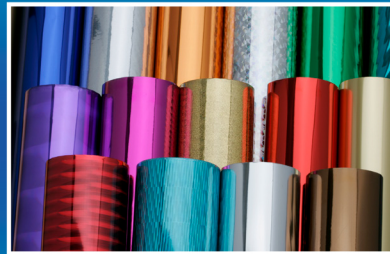
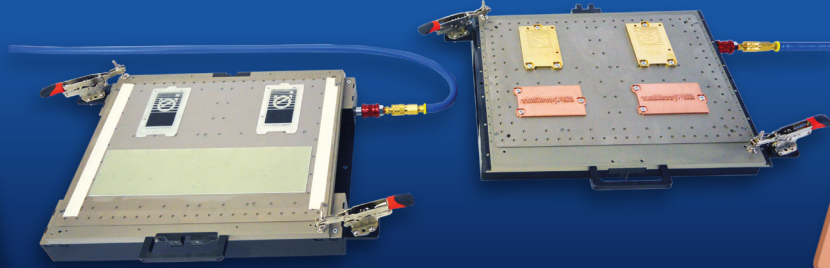
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A greener footprint

Global supermarkets and brands are looking to reduce their packaging footprint. What will be the impact on the label and packaging industry? Mike Fairley reports

The food and beverage sectors dominate the usage of labels worldwide, with the leading global supermarket groups and major brands having a significant influence on packaging and label purchasing trends.

This dominance has meant that supermarkets have built-up an almost unprecedented economic, purchasing and political power in the food and beverage sector, as well as a having a growing responsibility in promoting and demonstrating a high degree of corporate social responsibility.

One recent report highlighted that a third of global food sales were made by the world's ten largest supermarket chains. Another study found that food and beverage applications together accounted for about 30 percent of all global label demand, while the supermarket groups identified by Labels & Labelling Consultancy in the highlighted table – with more than 200,000 stores or retail outlets between them – are believed to represent more than half of global retail sales in a market estimated to be in excess of 26 trillion USD. That's a lot of labels that require printing annually.

Another recent study points out that by 2027 the food and beverage end-use sectors are expected to hold more than 55 percent of the global label market share. One important consequence of such supermarket domination, especially in the food sector, has been the steady and continuous growth in supermarket own-brand foods (also identified as private label, in-house brand, store brand, retailer brand or home brand), which are actually owned by the supermarket retailer, wholesaler or distributor and are exclusively sold in their own retail outlets.

Consequently, the leading supermarket groups have a key role in not only selling the products but also in their manufacture – including the detailed specification of the packaging and labels, the sourcing of packaging and label materials, and the supermarket and supplier relationship. In certain areas the supermarket groups have even come together with a common aim. As an example, 31 of the world's largest supermarkets have committed to taking steps to improve sustainable sourcing of raw materials.

Reduce, reuse, recycle, renew

Many of the leading supermarket groups assess their packaging and labels against the 4R Guidelines (Reduce, Reuse, Recycle, Renew), both working to reduce packaging and increase the recyclability of their packaging (and label) materials. A key aim is to make packaging recycling easier for customers. Carrefour, for example, aims for 100 percent recyclable, reusable or compostable packaging for its own brands by 2025.

A further company focusing on a 4R strategy is Tesco, a near 90 billion USD supermarket chain with around 7,000 stores in 12 countries. Tesco has been prioritizing ongoing removal of unnecessary packaging and working with suppliers and partners to reduce, reuse and recycle packaging. Its commitments include the removal of plastic packaging where it can, and introducing a scalable reusable packaging offer for customers.

Other leading supermarket groups have become signatories of the Ellen MacArthur Foundation's New Plastics Economy Global Commitment in which they are working towards zero plastic waste from their own-brand packaging by a specific target date and by making the plastic packaging they use 100 percent recyclable, compostable or reusable. Some of the groups have developed a holistic internationally applied strategy that comprises five action



The use of refillable containers is one way supermarkets are reducing their packaging footprint

“The leading supermarket groups have a key role in not only selling the products but also in their manufacture”

areas: from avoidance and design to recycling and removal, up to innovation and education, with a vision of 'less plastic – closed loops' becoming a reality.

Many of the supermarket groups, such as Lidl with some 11,000 stores in 32 countries, have also set ambitious carbon reduction targets and are looking to work collaboratively with their suppliers to establish their own climate targets and strategic plans for the next five years or more. Aldi too, with stores in 20 countries, has stated that it is continually working to reduce the amount of plastic and packaging that it uses, and to ensure that the materials it does use are easy for customers to recycle.

As the world's largest retailer in terms of sales, with over 500 billion USD in revenue annually, Walmart is working with US private brand label and packaging suppliers to achieve 100 recyclable, reusable or industrially compostable packaging for its private brand packaging by 2025. It is also targeting at least 20 percent post-consumer recycled content in private brand packaging by the year 2025.

With the focus of the circular economy on reducing, reusing and recycling, Spar's drive to redesign packaging has gained increased importance. Across Spar's 13,500 stores in some 48 countries, its partners are working to ensure unnecessary packaging and non-recyclable materials are removed from Spar own-brand products wherever possible. Key considerations are to ensure reduced CO2 emissions at the production phase and reduced energy consumption during recycling processes.

In the Netherlands, Dutch grocery retail company Ahold Delhaize has a family of local brands that serve more than 54 million shoppers each week in 11 countries. It is working towards zero plastic waste from own-brand packaging by 2025 by making the plastic packaging it uses 100 percent recyclable, compostable or reusable, and aims to minimize the overall lifecycle impact of its products through packaging optimization.

Also looking for ways to improve packaging by using eco-friendly materials, reducing content and decreasing the use of plastic whenever possible is 7-Eleven, with an estimated 70,000 outlets in

| Name | Global sales in USD | Stores/locations |
|-----------------------------|---------------------|---|
| The Kroger Co. | \$132.5 bn | 71,000 in 35 US states |
| 7-Eleven | \$109 bn | 70,000 + in 20 countries |
| Spar | \$46 bn | 13,500 + in 48 countries |
| Walmart | \$520 bn | 11,500 in 12 countries |
| Carrefour | \$117 bn | 12,200 + in 25 countries |
| Aldi | \$58.7 bn | 12,000 in 20 countries |
| Lidl, part of Schwarz Group | \$56.34 bn | 11,000 in 32 countries |
| Ahold Delhaize | \$87.4 bn | 7,000 + in 11 countries |
| Tesco | \$89.71 bn | 7,000 + in 12 countries |
| Cosco Wholesale Corporation | \$166.8 bn | 750 + US warehouses, with expansion into 10 markets |
| Albertsons Companies | \$70 bn | 2,200 in 34 US states |

Groups shown in the table represent more than 50% of all global retail sales of \$26.7 trillion, between them having more than 200,000 stores or outlets globally. Table compiled by Labels & Labelling Consultancy

“According to one report, a third of global food sales were made by the world’s ten largest supermarket chains”

16 countries, and global sales in excess of 100 billion USD. With much of its eco-friendly packaging including renewable or recycled content, or derived from sustainable resources, it is working to reduce packaging materials wherever possible.

In the USA, Kroger Co. with a family of around 71,000 stores – including brands such as Baker’s, City Market, Dillons, Fred Meyer, Jay C Food Store, Pay-Less, Ralphs – and covering some 35 US states, is claimed to be the world’s largest supermarket chain. It has been piloting reusable packaging systems, enabling consumers to purchase more than 100 products that have been redesigned with durable containers.

Also in the USA is Costco Wholesale, an American multinational which operates a chain of membership-only big-box retail warehouse stores. As of 2020, it was rated the fifth largest retailer in the world, and the world’s largest retailer of prime beef, organic foods, rotisserie chicken and wine. Costco continues to look for ways to improve the design of its packaging to reduce the amount, improve the efficiency, and improve operational efficiencies in order to reduce the packaging footprint and reduce costs. Its goal is for all packaging to be widely recyclable and/or made from recycled content.

Commitment

Go beyond the top ten or so global supermarket groups discussed above to look at the top 50 or even the top 100, and pretty well all of them are committed in

various way to improving their packaging and label footprint over the next five or six years. This commitment obviously has implications for all the packaging and label producers looking to serve the food, supermarket and beverage sectors.

If these commitments already seem to be quite stringent then the packaging and label producer needs to realize that the current supermarket policies were all drawn-up before the recent 2021 IPCC Report on global warming and the October COP26 Climate Conference in Glasgow took place, both of which will likely end-up putting further pressure on the global supermarkets and brands in terms of sustainable development and low carbon goals and, in turn, on label and packaging producers.

Much has changed over the past 18 months: the global pandemic has created many challenges for physical store retailers. The global market share of big supermarkets is now shrinking as a growing order of discounters and e-commerce continues to take hold. Amazon, for example, with global retail sales in excess of 380 billion USD in 2020, is the largest publicly traded market capitalization, while Alibaba (sales revenue 120 billion USD) is a world champion in sales via marketplace platforms.

As a consequence, many global supermarket groups have been facing pressure to reduce costs, rationalize product ranges, provide more own-brand products, and to develop or expand their own online shopping offerings. All of these factors have implications for label and packaging groups.

While the supermarket groups are the

world’s largest grocery and food retailers and undoubtedly have a major influence on label and package sourcing, especially of their own-brand products, similar patterns of influence are found in many other label end-user sectors. Just 10 companies for example, are said to be involved in or control pretty well almost every major food and beverage brand found and sold on grocery shelves worldwide: Kraft Heinz Company, PepsiCo, Nestlé, P&G, Unilever, Johnson & Johnson, Kellogg’s, Coca-Cola, General Mills and Mars.

Take any one of them to look at in more detail. Nestlé is a partner of the Ellen MacArthur Foundation’s New Plastics Economy initiative, and has announced its ambition to make 100 percent of its packaging recyclable or re-usable by 2025. Its vision is that none of its packaging, including plastics, ends up in landfill or as litter. All the other food and beverage brands have similar kinds of packaging footprint programs.

The same can be said of the world’s biggest pharmaceutical companies – such as Pfizer, Roche, Bayer, Novartis, Merck & Co, Johnson & Johnson, Sanofi SA, Bristol-Myers Squibb, GlaxoSmithKline and AstraZeneca – all of which have annual sales revenues of between around 40 billion and 80 billion USD. Again, as an example, Pfizer is dedicated to collaborating across its supply chain to reduce the environmental footprint of its packaging throughout its lifecycle.

Put all of this research together and the conclusion is that probably less than a 100 or so global super groups are responsible for specifying, sourcing, designing and buying the great majority of all the world’s labels and packaging, and for driving forward sustainable packaging programs, circular economies, packaging compliance, and carbon reduction initiatives. The recent 2021 IPCC Report on global warming and the October COP26 Climate Conference in Glasgow are likely to put further pressure on these groups to bring forward and enhance such initiatives.

Such pressures are undoubtedly going to also be pushed down the supply chain to the label and packaging suppliers in terms of materials sourcing, minimizing the use of plastics, cost reduction, carbon reduction, sustainability and recycling. If the label and packaging converter wants to understand where their major buying customers are going to take them over the five or ten years, then a study of their packaging footprint policies would be a good start.



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Label Congress 2021 reunites industry

The first Labelexpo-run event in 18 months drew 743 attendees and 57 exhibitors. Luis Rodriguez and Jordan Hart report

Label Congress 2021, organized by Labelexpo Global Series, welcomed 743 people to the Donald E. Stephens Convention Center in Rosemont, Illinois, for a table-top exhibition featuring 57 exhibitors running alongside two days of conference sessions.

The first day, moderated by L&L's North America editor Luis Rodriguez, started with an overview of global and US label market trends, followed by an in-depth look at the hot topic of the day, digital embellishment.

“We knew there was a terrific desire for the label industry to reconnect in person”

Two panel sessions followed on hybrid printing and whether label converters should move into flexible packaging, concluding with a presentation on IoT-driven connectivity for consumer products by Avery Dennison.

Day two, moderated by L&L's online editor Jordan Hart, began with Label Industry Global Awards Lifetime Achievement winner Federico d'Annunzio explaining how data transparency will transform the label industry, and this was followed by a panel discussion on sustainability. L&L columnist Paul Brauss then looked at how to create a culture of continuous improvement and the conference concluded with a panel on recruiting and retaining young talent.

The exhibition which ran alongside the conference attracted 57 exhibitors including Flint Group, Avery Dennison, Colordyne, Epson and Fujifilm.

'The response from visitors and exhibitors was overwhelmingly positive – in many cases this was the first time they had seen industry friends and colleagues for almost two years,' said Tasha Ventimiglia, event director at Labelexpo Americas.

'We were thrilled with the high quality of attendees from throughout the entire US and Latin America, and certainly all the feedback we heard was that decision makers were walking the floor. Our #labelreunion networking party on the first night was a great success. As a gold sponsor



AWA's Corey Reardon and TLMI's Linnea Kean opened the conference with a look at the global label market

of the event, Xeikon was able to take attendees to its innovation center just 15 minutes away. They had four showings and each one was completely full.'

'We knew there was a terrific desire for the label industry to reconnect in person and Label Congress 2021 proved that to be the case, despite the continued restrictions on travel. This gives us great confidence as we look forward to our first full Labelexpo events next year in Europe in April and back here at the Donald E. Stephens Convention Center in September 2022,' said Lisa Milburn, MD of the Tarsus Labels & Packaging Group.

TLMI president Linnea Keen added: 'Label Congress was a fantastic event! Everyone who attended was highly engaged and actively participated. Tarsus put on an outstanding event for the label industry and the two-day conference sessions were well attended. Our fellow exhibitors and TLMI members that we spoke to commented on the high quality of the conversations with attendees. Thank you Tarsus for bringing the industry back together – well done.'

Technology and the global market

The conference was kicked off by Linnea Keen, president of TLMI, and Corey Reardon, president and CEO of Alexander Watson Associates, with a presentation covering the current state of the global label market.

Opening with a split-comparison of labeling technologies and applications

focused on primary product labeling, Reardon and Keen pointed out the impact Covid had on both primary product and VIP labeling and how the growth of VIP especially has been accelerated by the pandemic. They then continued with a conversation about the estimated market growth of labeling by format and by technology.

Closing out their discussion on the current order backlog and supply chain challenges the label industry is facing, Reardon posited: 'I'd like to be more optimistic, like some people, in that it would be sooner rather than later. But reality might say that we're in for a period over the next six to 18 months of dealing with these capacity, backlog and supply chain issues.'

Next was a set of presentations on digital embellishment technologies by Hans Gerinckx, vice president global sales and channels of Flint Group Digital/Xeikon, and Jim Kehring, west coast regional sales manager at A B Graphic.

Gernickx opened his presentation by saying: 'I'm going to make a tough assumption here. I'm going to say that digital printing today becomes a commodity. So I'm not going to talk about what's currently standard on board a traditional digital press. We all know, we all know it works, so I'm not going to talk about that. But I am going to talk about the new possibilities of digital embellishment.'

How can we create new businesses, how can we create additional applications, things that we did not do before,' said Gernickx. He outlined the steps it would take for converters to implement and take advantage of the technology, providing the audience with physical examples of labels that used digital embellishment technologies and showing the steps it took to print these labels.

Kehring spoke about the capabilities of digital embellishment, pointing out that, in comparison to traditional printing processes, digital shines due to the lack of tooling required and the ability to more quickly fix issues that may come up while running a job. 'If they don't like how it looks, they can make live changes. Which is again, very different,' said Kehring. 'If you were to create a screen conventionally, and get that all set up, get your ink down, and realize there's not enough height or it's too high or it doesn't look right, you are stuck with that screen. You've got to go get another one or make another one, but with digital embellishment it's just a push of a button.'

He also discussed how there can be a complete replacement of tooling with laser die-cutting and how digital print processes can be fully automated with the use of automated pre-press and inspection software.

In the first panel discussion of the day, moderated by Labels & Labeling's North America editor Luis Rodriguez, panelists Mike Pruitt, industrial printing product manager at Epson, Taylor Buckthorpe, director of sales at Colordyne, and Mark Turk, president and CEO of International Label & Printing, looked to answer the question, 'What are the benefits of hybrid printing?'

As the converter on the panel, Turk was keen to point out that one of the main benefits of International Label & Printing's hybrid press, which he called the workhorse of its operation, was allowing the company to have higher throughput and to get the product to customers more quickly.

One discussion point was figuring out what are the optimum jobs to run on a hybrid press – a question to which, according to the panel, there is no easy answer. 'There's no "if X then there's a success" statement you can make in terms of label and packaging production,' said Buckthorpe, agreeing with Turk who said that the choice depends on the job at hand. 'My customers who are making the most out of hybrid printing typically have the most robust costing systems in their facility.'

Buckthorpe said these systems allow customers to decide how much of specific run should be printed flexographically and how much should be printed digitally. Pruitt agreed that it's dependent on the job as a whole and the amount of manual work that is required.

In terms of challenges faced with hybrid printing, the panel agreed that using both flexo and digital ink systems throws up issues converters should be aware of.

One example is color matching between flexo and digital ink systems, which can lead to difficult conversations with brand owners.

'You have to have an extended conversation with your customer on what's been printed in the past, what's been matched, and what digital can do, because it's a little different,' said Pruitt. Buckthorpe agreed, describing how he has had these conversations with brand owners when inkjet may not have matched exactly what flexo spot colors achieve.

A second panel focused on whether label converters should diversify into flexible packaging. This session was moderated by TLMI's Linnea Keen and featured Bruce Hanson, CEO of AWT Labels & Packaging, Matt Bennett, global vice president business strategy, packaging at Fujifilm North, and Chris Baldwin, sales director at Omet Americas.

They discussed the challenges converters face when diversifying into flexible

packaging. Outside the financial challenges of purchasing a press configured to handle flexible packaging materials, label converters are also faced with the need to train operators on the skills required to run these machines, and to understand the complete range of material constructions and the regulatory issues involved.

'A lot of flexible package companies have chemists and scientists working with them who understand inks and films and barrier constructions, and how to make sure there's no contamination between the inks, coatings, primers, and what's in the bags,' said Bennett. 'It's really difficult stuff, and if you don't know that going in, you're not going to last long. You really have to have expertise. Because you don't want to be the company that delivers a bag with migration problems, because that may be the last bag you deliver.'

To finish day one, Salisha Fingerhut, market development manager, atma.io at Avery Dennison, gave a presentation on how converters can take advantage of the Internet of Things and how it will affect the label and packaging industry. She broke down the potential ways the end user can take advantage of 'smart' labels such as creating digital identities of each product in the cloud, being able to track each product from the beginning of its lifecycle in the supply chain all the way down to the consumer's hands, allowing end-users to authenticate products and track exactly where bottle necks happen when there are disruptions in the supply chain.

Future-proofing your business

Day two of the conference focused on the theme of future-proofing your business. The first session saw Federico d'Annunzio, founder and CEO of transpar3nt.com, outline a broad vision of the future of the printing industry based around data transparency. 'What we have to deliver is value, and value is tightly connected with data with digital,' he said. Good data will

“Do you have the data you need to make automated manufacturing decisions? Can you get that data where you need it? And can you make decisions based on that data?”



The table-top exhibition hosted 57 industry suppliers

be key because, according to d'Annunzio, 'everything which can be automated, will be automated.' Businesses will need to take digitization and data processes seriously if they want to continue to be relevant even just a few years down the line.

Picking up where d'Annunzio left off, a panel session asked the question: how far can automation and Industry 4.0 go? The discussion was moderated by Steve Metcalf, chief marketing and IoT officer at Baldwin technology, with panelists Michael Weyermann, VP of sales and marketing at MPS; Mike Rottenborn, CEO of Global Graphics; Nate Hoogeboom, MIS implementation specialist at Cerm; and Robert Buongiorno, president of BST North America.

'For us, Industry 4.0 is quite simply the digital conversion of manufacturing,' said Rottenborn. 'There are three factors to that: one, do you have the data you need to make automated manufacturing decisions; two, can you get that data where you need it; and three, can you make decisions based on that data?'

However, this process doesn't happen overnight. When talking about 'lights out' manufacturing, 'it doesn't need to be full lights out implementation,' said Nate Hoogeboom. 'It's the opportunity to start automation and improvement to your workflows today. It's a progress not perfection mindset. Every day, every month, every year we should be able to say we are doing it a little bit better, and that time starts today.'

The third session focused on how to build a sustainable future for your converting business. Moderated by Mike Ferrari, founder and president of Ferrari Innovation Solutions, the panel was comprised of Julian Cass, VP North America NW at Flint Group; Kevin Clunie, VP of sales and marketing at Mactac and VP of CELAB; Abby Meyer, research engineer at Belmark; and Danielle Jerschefske, business development manager at Outlook Group. The panel discussed how a corporate vision influences how and to what extent a business adopts sustainability. 'If you can make the sustainable choice the easy choice, then it's going to stick,' said Clunie.

For Belmark, the motive for sustainability is quite simple. 'At Belmark we have our overall company mission statement which is "we do what is right," and that applies to sustainability. Sustainability is simply the right thing to do,' said Meyer. To avoid sustainability becoming just another box to tick in the corporate checklist, Cass said: 'You need people who are passionate about sustainability and they will drive that agenda throughout the company.'

Similar to Hoogeboom's comments from the second session, Meyer echoed that



L-R Baldwin Technology's Steve Metcalf; Michael Weyermann of MPS; Mike Rottenborn of Global Graphics; Nate Hoogeboom of Cerm; Robert Buongiorno of BST North America

“You need people who are passionate about sustainability and they will drive that agenda throughout the company”



L-R Mike Ferrari of Ferrari Innovation Solutions; Julian Cass of Flint Group; Kevin Clunie of Mactac and CELAB; Danielle Jerschefske of Outlook Group; Abby Meyer of Belmark



L-R Elizabeth Yerecic of Yerecic Label; L&L's Jordan Hart; Nicole Rivera of K Laser; Katelyn Bohr of ColorDyne; Amy Chott, a student at Harper College

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Fujifilm previewed its new UV inkjet label press, the LP350



The Armor stand at Label Congress 2021

What they said

Sustainability session panelist Kevin Clunie, representing the CELAB global liner recycling consortium, said: 'The balance of vendors and label converters on the panel really seemed to drive conversation and allow us to build on each other's thoughts. I learned a lot from the other panelist's experience and enjoyed hearing where they are on their sustainability journeys; based upon the number and nature of questions, the audience did too.'

Steve Metcalf of Baldwin Technology, moderator on the automation panel, said: 'Industry 4.0 is central to our future, and we are very thankful that the team at Tarsus and Labels & Labeling recognizes this and is leading the discussion. Data-connected technologies will be a key step forward for label-making, and we were excited for the opportunity to moderate our industry's first in-person panel on this subject at Label Congress 2021, which will garner a lot more attention in the months ahead.'

'This show has been fantastic. We've met friends we've not seen for two years,' said Michael DeBard, president of DGM which represents Cartes in the US market.

Mark Turk, CEO of International Label & Printing and a panelist in the hybrid printing session, added: 'I thought the conference was great. I was not expecting such a large turnout and was pleasantly surprised. All the vendors I spoke with told me the event was productive for them and were happy to have exhibited.'

'Having the ability to walk the exhibition hall and see vendors was well done,' said Bruce Hanson, CEO at AWT Labels & Packaging, who participated as a panelist in a discussion asking if label converters should diversify into flexible packaging. 'Overall, I thought the show was great. Our team all got something out of it, we built some relationships, and took advantage of the networking.'

“There definitely needs to be a lot more exposure of this industry to high school students. We were told that print is dead; but labels are not going anywhere”

sustainability can be a journey that starts with small steps, such as switching to efficient LED lighting or more efficient batteries in forklifts. Setting a goal can be a good way to drive sustainability as well.

'At Outlook Group we have over a decade of being more than 95 percent landfill free,' said Jerschefske. Milestones such as that help define a target for a company to pursue, rather than trying to tackle sustainability from all angles at once.

The fourth session was a presentation by Paul Brauss, consultant and executive coach at Brauss Consulting and an L&L columnist. He discussed how to create a culture of continuous improvement and align leadership with business processes.

'Everyone wants to know, what is our company's strategy?' said Brauss. He clarified that a strategy is different from an outcome or a goal, such as increasing revenue. A strategy incorporates four key blocks: the financial perspective, the customer perspective, the internal perspective, and the learning and growth perspective. Considering each of these blocks gives a deeper understanding of the company and its strategy.

He also discussed creating new metrics for your business, the difference between a driver and a result, fostering involvement and accountability within a company, and the benefits of adopting a Kaizen approach.

The final session was a panel focused on recruiting and retaining young talent. Moderated by Labels & Labeling's online editor Jordan Hart, the panel featured Elizabeth Yerecic, key account manager at Yerecic Label; Katelyn Bohr, director of marketing at Colordyne Technologies; Nicole Rivera, director of administration and operations at K Laser; and Amy Chott, a student studying graphic arts and applied sciences at Harper College.

The panel discussed the ongoing labor shortage within the print industry – one cause of which is the lack of education about the benefits of a career in print.

'Our converting partners are going into high schools to let young people know that this is an option because frankly they just don't know. They don't know that this industry is a path or that it has growth opportunities. Just because someone starts operating a press doesn't mean they will stay there their whole lives,' said Bohr.

Defining a clear growth path for an employee's career is key to retention, according to Elizabeth Yerecic. Yerecic Label uses a tiered training system to progress its operators from basic finishing equipment to complex presses. This defined career path, along with providing good pay and good benefits, has resulted in a well-developed and tenured workforce.

However, a career in labels ultimately must start with awareness, as Chott emphasized. 'If I had known about the size and the scale of this industry sooner, I could have saved five years of my life trying out a bunch of different things and gotten here a lot sooner,' she commented.

'There definitely needs to be a lot more exposure of this industry to high school students,' Rivera added. 'We were told that print is dead; but labels are not going anywhere.'



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Hitting perfect 21

After 21 years in the South African market, Coastal Labels evolved into Sullwald Printing Solutions as it grew beyond serving only the coastal regions and just label clients. Piotr Wnuk reports

Sullwald Printing Solutions is a family-owned and run company offering high-quality adhesive and non-adhesive packaging for a wide variety of industries, including wine, premium spirits, beer, and FMCG. The company currently operates several flexo and digital presses to print self-adhesive and peel and reveal labels, flexible packaging, as well as various marketing materials, boxes, tags, cardboard sleeves, printed tissue and even wax paper.

The company was acquired by Marius Sullwald 21 years ago after he migrated to the Western Cape, having sold three businesses in Phalaborwa in Limpopo. The new owner, previously active in the construction industry, had recognized the immense potential of the printing sector. This career change also offered him the opportunity to spend more time with his family, which he relocated to Cape Town.

'I was young and ambitious,' recalls Sullwald, 'but I felt I was losing out on family life and needed a complete change, so I sold my businesses and relocated to the Cape, where I was fortunate to find Coastal Labels up for sale.'

'When I think about where we started, I can't believe where we are at now. I'm so proud of what Marius has achieved over the years and how we've all helped to make Sullwald Printing Solutions a success,' adds Sullwald's wife Salome, who joined the company to manage the finance department.

Sullwald had a particular mission. He wanted to develop a company built on the importance of individual service and quality standards to help his customers grow their brands and add value to their products. He also wanted to contribute to the future by creating job opportunities and mentoring the next generation.

Just four years after taking over, the company's original premises in Parow was moved to bigger production facilities in Brackenfell to enable growth and accommodate an increase in staff from 17 to nearly 60.

Anniversary celebrations

The success of Coastal Labels continued with substantial growth over the last two decades. The company quickly expanded its geographical reach beyond the coastal regions and increased its production capabilities beyond the supply of self-adhesive labels. Therefore, during



L-R Rotocon's Michael and Pascal Aengenwoort with the Sullwald family of Marius, Salome and Heinrich

“We’ve noticed a rising trend among wine businesses who require shorter runs with more variants and tailor-made labels. Inkjet printing is the future”

the recent 21st-anniversary event, Marius Sullwald announced a new company name.

'The name change to Sullwald Printing Solutions perfectly reflects how the company has grown and that relationships and printing solutions are at the core of the business,' he says. 'The Coastal Labels name was no longer fitting for the company as coastal is specific to a certain region and labels a particular service. Our capability has grown beyond self-adhesive label printing and serving the coastal regions.'

According to Marius, placing his surname in the new company name underlines ethical values and the fact that it's a family-owned company; printing denotes the diverse services and solutions emphasize that the team offers more than just products.

'The industry is changing,' adds Sullwald, 'and we need to change along with it. It took me two months to convince myself to use our family name. But being a family business, it made perfect sense. In an attempt to diversify our portfolio, we felt the timing was right for a change. Our journey has been an interesting but ethical one, and we're proud to bear the name of Sullwald Printing Solutions.'

At the event, Sullwald and his team introduced suppliers, clients and media

members to the company's new range of printing equipment: a Screen Truepress L350UV+ Series and EcoLine RDF 330, both supplied by Rotocon. Sullwald took attendees on a comprehensive tour of the business, explaining the intricacies of each machine in detail.

According to Sullwald, digital label printing is a relatively new concept in South Africa, but demand is growing. Modern printing businesses should have a healthy balance of flexo and digital printing equipment to diversify their label offering, he says. 'We've noticed a rising trend among wine businesses who require shorter runs with more variants and tailor-made labels. Inkjet printing is the future.'

The next stop on the factory tour was the Screen Truepress Jet L350UV+ series, which Sullwald especially values for consistency, flexibility and ease of use, calling it a 'necessary addition'.

'The amazing aspect of this machine is that it's instantaneous,' he says. 'You simply press the button, and the ink literally jets directly onto the paper. No plates, no cleaning, no set-up. It's a simple, turn-key solution that consistently produces high-quality labels. Digital printing not only enables us to make beautiful, intricate labels but also offers a cost-effective option



Marius Sullwald with the new Screen Truepress L350UV+ Series

“Our customers are of paramount importance, and we give them the best possible service and quality so that their products stand out on-shelf”



Sullwald Printing Solutions has the most Wink SmartGap Advance systems installed in South Africa

for smaller runs. The press has provided us with a competitive edge by supplying customers with premium labels with quick turnaround times.'

'The Truepress Jet L350UV+ series offers improved color reproduction and superior scalability, enabling it to meet an even wider variety of market needs,' adds Rotocon Group's CEO Michael Aengenvoort. 'Another huge benefit is that there are no consumables. The ink is injected directly onto the substrate. The machine's seamless plug-and-play process makes it easy for wineries to reproduce a label with updated information the following year.'

Sullwald mentions that it doesn't matter how much information needs to be

included on the label because the Truepress can handle as many different versions and variations as necessary. 'It's already bringing unrivaled levels of functionality to our operation,' he claims. 'It's providing a tremendous boost to our competitive edge in the market for self-adhesive wine labels and has considerably expanded the range of labels we can print.'

The perfect finish

With two printing stations, the newly installed EcoLine RDF 330 is a digital label converting system chosen by Sullwald to expand the converter's embellishment offering and produce innovative, unique labels more efficiently.

'From cold-foiling and lamination/delamination to flexo-varnishing modules, a UV dryer system, full- and semi-rotary die-cutting, and a slitting unit, this machine has it all. It allows us the freedom to produce bespoke label solutions to meet any client requirements, no matter how detailed or intricate,' continues Sullwald. 'This is our second RDF finishing system as the first machine purchased two years ago could no longer keep up with the workload.'

According to Sullwald, this investment will also help expand the company's packaging and marketing material offerings to include flexible formats and marketing materials. 'Before the onset of Covid-19, we decided to venture into these markets and realized that another finishing press will accommodate the growing need for these services and help expand our customer base.'

Investment requires strategic planning, and Sullwald has always run the business conservatively. 'Rotocon's after-sales service and spare parts availability have made the decision-making process easier. It helps that we're in the same area as the Cape Town team as we know the technicians are quick to respond whenever we need their assistance,' he says.

Asked for the secret of his success, Sullwald quickly and firmly mentions teamwork. He is backed by a strong and growing team sharing his passion for the industry.

The production team is backed up by a strong sales unit. 'For some companies, the sales team might not seem as important, but we've noticed that having a big sales team benefits the business. Our customers are of paramount importance, and we give them the best possible service and quality so that their products stand out on-shelf.'

Marius and Salome Sullwald are proud of what they've achieved since migrating to the Cape. In 2020, their son Heinrich finished his studies and joined the company as a systems administrator.

'Heinrich joined at a tough time as the pandemic changed the industry within a few months, but he has learned a lot,' states Sullwald.

When discussing future endeavors, Sullwald points to broadening the product and services portfolio and investing in another building as fitting to the company's growth strategy. 'I've always run the company conservatively because it's more important to keep the doors open and think about the whole team rather than making more profit,' he concludes.



More information about Sullwald Printing Solutions go to: www.sullprint.com

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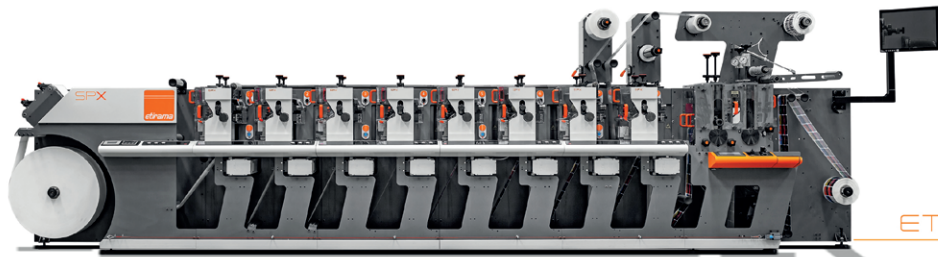
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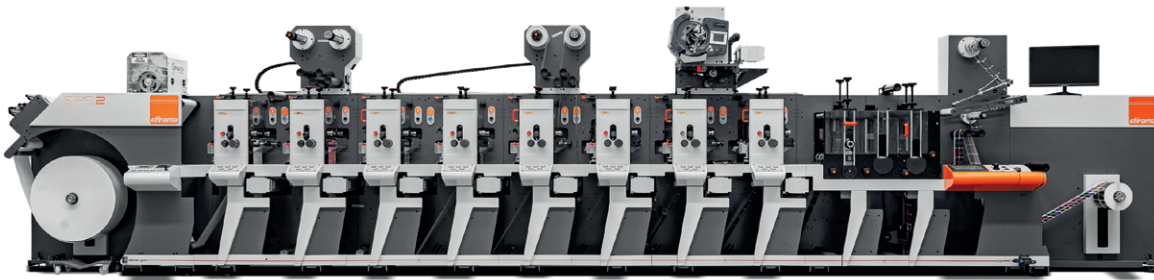
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Another year of Covid . . . and booze bans

Gill Loubser reports on the fallout from repeated alcohol bans in South Africa

As the Covid-19 pandemic entered the global scene and firmly took root, last year's headline for this traditional end-of year round-up was 'A year like no other.' Well, this year, of course, we've simply endured another 12 months of similar deprivations, which now seem to be becoming entrenched as the 'new normal'.

In South Africa, for instance, the population has endured no fewer than four periods of enforced abstinence, with total bans on liquor sales, ostensibly to free up hospital beds occupied by alcohol-induced trauma patients. But there's also a widely-held belief that the pandemic has proved a godsend for the prohibitionist lobby among South Africa's government ministers and cohorts, united in a common goal to impose more rigorous controls over the sale and distribution of liquor.

“Whichever way you look at it, manufacturing in South Africa – whether consumer goods or their packaging – isn't for the faint-hearted. But despite any number of cogent reasons for this statement, businesses do keep soldiering on”

When the latest (fourth) ban was announced, the alcohol industry was quick to fight back with one body approaching the high court for an urgent interdict against applying the ban in the Western Cape (home of the wine industry) and another requesting wine farms be allowed to sell their products online. In addition, industry associations have repeatedly requested the provision of scientific reasons for these successive alcohol bans.

But as with previous exhortations, it all fell on deaf ears.

At the time of writing, however, restrictions have been eased somewhat, although liquor sales are still verboten over the weekend.

What price prohibition?

While consumers view the bans as an incomprehensible, totally illogical imposition, they are a cause for real hardship among liquor manufacturers and their entire supply chains, including, of course, packaging suppliers.

The costs of this madness are immense. The first three prohibitions alone, which lasted a cumulative four months, cost the alcohol industry over R36 billion (USD 2.5 billion) according to FTI Consulting's Economic Research Unit. And this is an industry that contributes R173 billion (USD 11.7 billion), or 3.4 percent, to the country's GDP.

Another bone of contention is that booze bans have fueled the growth of the illicit alcohol market, which, says a recent Euromonitor International report, is valued at R20 billion



South African consumers are turning to non-alcoholic beverages

Embracing the spirit of Abstinence

In the face of repeated bans on alcohol sales, South African consumers are turning to non-alcoholic beverages.

Inspired by the biodiversity of the Western Cape floral kingdom, Abstinence is a leading non-alcoholic brand. The range currently comprises two aperitifs and four spirits, which have received global awards this year in London and San Francisco. Designed by graphic designer Hugh Fletcher, the self-adhesive labels are printed by Cape Town-based Win-Pak on an HP Indigo digital press.

(USD 1.4 billion) per year, and growing at an alarming rate.

According to the National Liquor Traders Council, the illicit alcohol trade has grown like an aggressive cancer under cover of the alcohol bans, forcing consumers to buy from previously unheard-of sources, while the legal industry was shut down by the government. Apart from business losses, the tax loss to the fiscus is also enormous.

So far as packaging is concerned, the glass industry, which contributes over R11 billion (USD 730m) annually to GDP, estimated a daily loss of R8 million (USD 531m) to keep furnaces running during the alcohol embargoes (a necessary precaution to prevent irreparable furnace damage).

Before the latest ban, South Africa's largest glassmaker, Consol, which relies for much of its income on alcoholic beverage manufacturers, had announced that its R1.5 billion (USD 85 million) plans to build a new bottle plant (a plan shattered in August 2020) would be reconsidered, citing a return of demand for glass bottles back to pre-pandemic levels.

Now, however, the company is again considering shelving those plans.

The expansion of Consol's glass production facility in Nigel (south east of Johannesburg), would have represented the



MCC Paarl printed Nederburg's newly redesigned labels

Nederburg labels refreshed

Owned by Distell and based in Paarl, Western Cape, multiple award-winning Nederburg is among South Africa's best-known wine producers.

This iconic brand has recently been refreshed to bring its labels in line with modern consumer sentiments and trends.

'We wanted to maintain the brand's leadership position in the wine category,' says Jackie Oliver, Nederburg marketing manager. 'We also wanted consumers to see a brand that's been familiar in South Africa for over 200 years, a brand that has a story to tell, that has equity. To retain the familiarity, we had to look back at all the logos and how they've changed over the years; we had to find certain elements that bring across the symbolism of Nederburg and specifically its values.'

Cape Town-based Bravo Design was given free rein to update the wine labels with a design that would work in local and international markets. The goal was to simplify and refine existing labels, while also introducing a new style of wine.

'Our heritage is important to us, and we wanted it to stand out with a clear name and crest, and incorporating Nederburg's iconic red,' Oliver continues.

While the technical aspects of the rebranding weren't complicated, the new designs had to factor in printing high volumes to be applied on high-speed labeling lines.

Flexo-printed by MCC Paarl, Nederburg's new labels clearly draw on the past, while being distinctly refreshed; they offer clearly enhanced assets, with the Nederburg crest, in vivid red, enjoying prominence.

Esco names Technology Global as Nigeria distributor

Esco has partnered with Technology Global Services to distribute its range of AVT print inspection systems in Nigeria.

Lagos-based Technology Global will act as distributor for the full range of Esco AVT Apollo, Jupiter and Argus inspection systems for packaging, the AVT Titan metal sheet decoration inspection system and the AVT Helios inline inspection system for labels, as well as the company's label and packaging workflow software.

"Another plus for some label printers is increased demand for packaging and labels thanks to more home consumption of food and beverages"

construction of the country's first furnace since 2010, and brought much-needed employment opportunities.

'The project was halted owing to the impact of the previous alcohol bans. Now our investment decision will have to take cognizance of the extent of the latest alcohol ban and its impact on anticipated future demand,' explained Mike Arnold, CEO of Consol Glass

The decision mirrored that of South African Breweries, one of Consol's biggest customers. The brewery canceled R5 billion (USD 332m) in investments in a year, citing the multiple alcohol bans related to the Covid-19 lockdown.

Impact

On the labeling front, Bruce Beswick, MD of Beswick Machinery (among other things, Bobst's South African partner), comments on the effect of the alcohol ban on the country's label printers: 'Of course the impact was immense on our customers who supply the alcoholic beverage sector, but equally impactful are the shortages of raw materials as a result of Covid and problems with general global supply and shipping, which are still struggling to recover.'

However, it's not all bad news; it appears that investment levels among label printers remain relatively unscathed. 'We received orders for new machines even during the worst of Covid times, and are still enjoying a good level of bookings,' Bruce Beswick remarks. 'Our technicians continue to install and commission new equipment, and to service existing kit, so fortunately we've been relatively unaffected.'

'Financially, in fact, our results are improved because we usually invest substantial amounts annually, training employees at OEM factories around the world, so this cost saving has been positive. Naturally, though, we would prefer to continue with our upskilling programs, to better support local label printers, but take whatever upside we can from this crisis.'

Another plus for some label printers is increased demand for packaging and labels thanks to more home consumption of food and beverages.

Whichever way you look at it, manufacturing in South Africa – whether consumer goods or their packaging – isn't for the faint-hearted. But despite any number of cogent reasons for this statement – including draconian labor laws; a business-unfriendly tax regime; a government hostile to private enterprise; ridiculously regulated prices (e.g. power); rampant inflation; and an ever-weakening local currency – businesses do keep soldiering on.

As remarked recently by Simon Downes, owner and executive chairman of Shave & Gibson, a 40-year-old Durban-based folding carton manufacturer: 'The last 18 months of the Covid-19 crisis have changed the way we approach every aspect of life; and in this unprecedented environment we've become more introspective. We've had to decide what to make of the opportunity to change the surrounding dynamic. As Winston Churchill famously declared during the bleakest days of World War Two, "Never let a good crisis go to waste!" We've certainly elected to follow that edict, and intend to emerge stronger and leaner than we were before this dreadful pandemic.'



For more from L&L's Africa correspondent Gill Loubser, go to www.labelsandlabeling.com/contributors/gill-loubser



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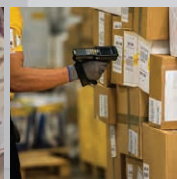
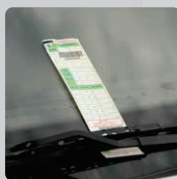
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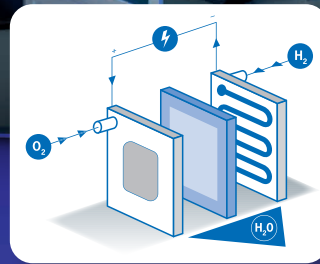
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Labeling start-ups

Start-up brands often face several creative hurdles when it comes to labeling and packaging. Indian brand strategist Shivani Parmar says converters can help solve their problems. Akanksha Meena reports

The rise of e-commerce in India is seeing more and more start-up brands cropping up. With increasing competition comes the need for creative labeling and packaging. Shivani Parmar, brand strategist and founder of The Digital Paradox, speaks about the pain points of start-up brands when it comes to labeling and packaging.

Parmar started her career in marketing working with start-ups and SMEs. Instead of focusing just on digital marketing, she wanted to help start-ups all the way from forming a business plan to marketing the end product.

'It is exciting because it's creative and lets you build something. Your goal is not limited, it requires you to look at the vastness of things available to you and that excitement is what keeps it going,' she says.

'A lot of the time, start-ups know what they want and where they want to go, but the process gets a little lost. We help them put their vision together in a manner that consumers can understand what they are offering.'

A young entrepreneur and rally car driver, Parmar used to work in Dublin. On returning to India, she worked with companies such as leading advertising agency DDB Mudra. In 2017, she established The Digital Paradox.

She says that the problems of start-ups when it comes to packaging are present from the very beginning. Understanding that certain types of substrates and adhesives are made for certain labeling applications can be a challenge. 'For example, food such as something with oil can weaken the adhesive of a label and it might come off.'

Start-up brands can miss out on looking at the different variety of substrates available in the market. They take design references from existing brands but are unable to differentiate between the types

of materials used. 'But when you go to manufacturers' website, you see all different kinds of substrates.'

However, she points out that converters often stock a limited variety of products and recommend them based on availability. In the cut-throat competition of the FMCG space, start-ups need support and guidance to create a product that can compete with international brands. Converters could help them understand how to achieve it.

'I go to converters and I know what kind of conversation I would like to have with them to understand what is needed. We try to bridge the gap so that start-ups can understand how their label is made and what kind of material is used. With my learning about different kinds of substrates available, I try to help brands take a decision.'

She says that her father, print industry veteran Vimal Parmar, has been supportive. 'Thanks to my father, I have understood some part of the industry and how it works.'

The problem extends to young designers as well, who could, in Shivani Parmar's opinion, design better packaging when equipped with knowledge of the kind of substrates, adhesives and finishing options available. 'If young designers know how different materials can be printed and embellished and how a design might look on each of them, they could enhance the result.'

The Digital Paradox has an in-house design and production team but is open to collaborating with like-minded people in case a brand needs more than the company can offer.

'I spoke to one of the designers when she was a student. Her professor told her to get a print. The student was surprised to see so many types of print and designs when she visited a print shop.' This knowledge is crucial in design.



Shivani Parmar, founder of The Digital Paradox

"If young designers know how different materials can be printed and embellished and how a design might look on each of them, they could enhance the result"



Labels designed by The Digital Paradox

Visualizing the brand

The process of creating a label starts by visualizing the brand. ‘Then we pick colors. At this point, we design a label with our in-house designer. Then we research competitors in the market. How can you be different from what is already present in the market? That is when the whole process begins. The substrate is the last thing that we think about. I think that it should be discussed earlier in the process. The knowledge would be useful to design something better than what we currently do.’

She wonders if the process could be reversed. ‘They could choose the best substrate, printing and, based on that, the design. But right now it happens the other way. Beyond that they do not have any understanding of how they can go about printing,’ she explains.

The knowledge of different kinds of materials available and their functionalities and applications could enhance the function of a label. It needs to come from converters and manufacturers.

Parmar adds that helping young designers understand margins could also be useful. ‘Each printer has different margins. How can designers optimize a label accordingly so that it is printed without wasting paper? How can they use the extra paper?’

Merely figuring out the design is just half the battle. The other half of the process is understanding how the design will translate to print. Then comes the problem of color. ‘Understanding what you see on digital and what you see in print is vast extremes. Start-ups do not understand that either.’

Printing using different materials and inks can produce substantially different results. ‘They lack the awareness of how a logo and its colors are going to look, for example, on a yoga mat, t-shirt or label and packaging. This knowledge could help promote fresh ideas about what else they could offer to their customers.’

She adds: ‘The details of it, such as font sizes, sub-standardization process – those kinds of guidelines are missing. They could be out there, but it is difficult for start-ups to find them.’

Ensuring that the correct information is printed on a label can also be a challenge. Taking food regulations as an example, Parmar says that there are Food Safety and Standards Authority of India (FSSAI) guidelines about the information to be put on the label.

‘Specially if it’s an organic product. Understanding what an organic product is, the details of the allergens and the importance of stating nutritional value, ingredients, manufacturing date, packaging date and best before also needs to come in. India is different from the international market. In India, we mention the approximate time by which it expires in contrast to the West that prints the exact date. The regulations in the food industry vary so much from the West. When I saw the list of allergens that needs to be mentioned on the label on the European website the list was pages and pages but for India, it was just mentioned in few brackets. It is up to you to figure out what comes under those categories mentioned in brackets.’

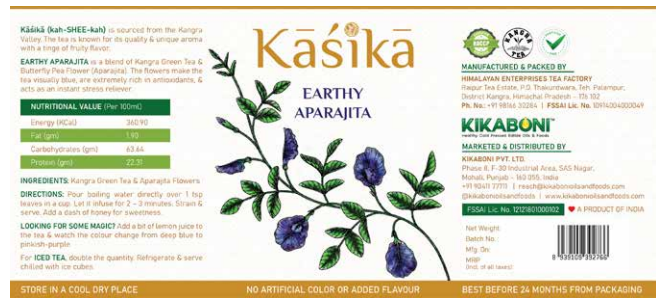
She adds that as awareness is growing, brands are gradually mentioning the important details on packaging. But ensuring that all the required details are mentioned on a label and making it fit particular label sizes is a challenge for start-ups. ‘The smaller the bottle, the smaller the label. Then you need to figure out how much crucial information you can put on it.’

Having experienced her share of botched print, she asks what kind of communication is needed to help printers understand what we want and if they need to tell us more about what we want?’

Education

According to Parmar, education for everyone involved in the process of creating a label is crucial. ‘Not all of us can be experts. There already are experts which is why we try to go to them and that is where converters could come in. They are more up to speed with the developments in the industry.’

‘Start-ups are just starting. They may not have got into the



Labels designed by The Digital Paradox

“When start-ups compete with international brands, the label needs to look just as good as theirs, and converters need to help us understand how start-ups can achieve that”

depths of thinking how to print a label. They might not consider the kind of material that goes behind it. They could read about it and watch videos online. But there’s only so much that they can learn from a screen when it comes to printing. You need to see how it looks when it is printed. You need to feel the quality.

‘When start-ups compete with international brands, the label needs to look just as good as theirs, and converters need to help us understand how start-ups can achieve that.’

Converters and manufacturers need to be more approachable for brands that are the end users of their products.

‘The knowledge of the availability of substrates and understanding of if you have shampoo bottle in comparison to oil bottles, both are bottles at the end of the day, but the product inside will hamper the performance of the label. Maybe the understanding of that could come in. They could guide brands and even educate us.’

She adds that an ecosystem where brands and marketers could go to manufacturers and converters and ask for the best product based on the brand identity could be instrumental in producing quality labels and packaging. ‘We want to understand what our options are. But is there something more they could do to help us be more creative?’

Start-ups tend to keep designs simple because cost comes into play. They need guidance on how they could get the best design at a low cost. Parmar says that these answers could also support start-ups adapt to different packaging styles. ‘Then it’s not just the bigger brands who can afford to create stunning packaging.’



For more from Akanksha Meena on the Indian market, go to www.labelsandlabeling.com/contributors/akanksha-meena

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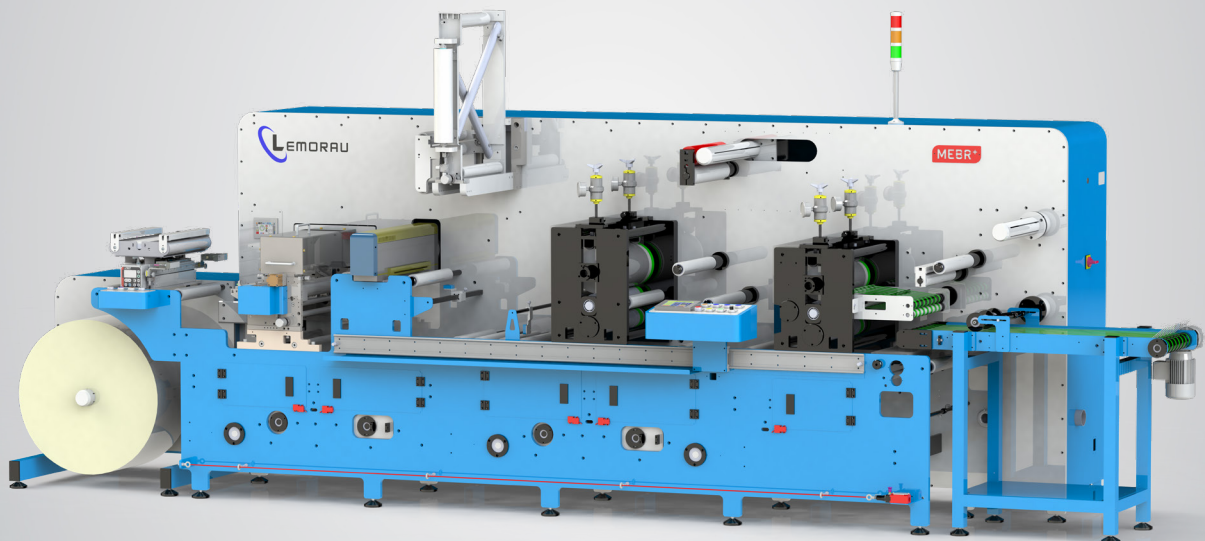


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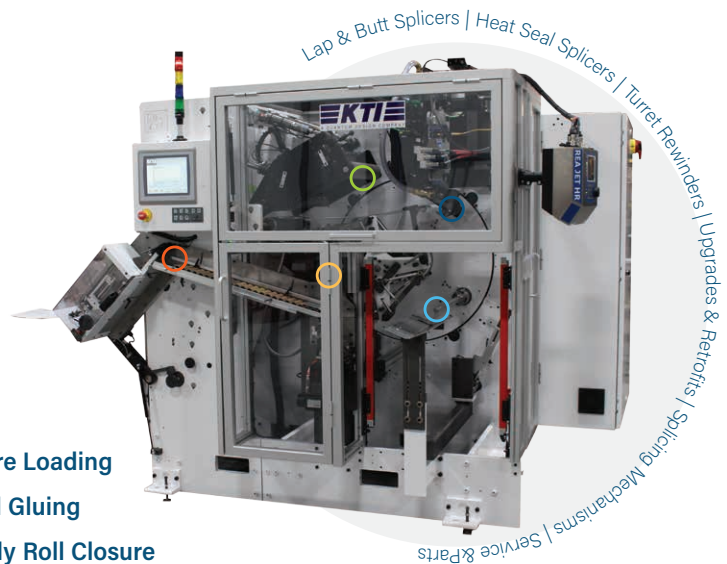
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Flex Films International sets up five new plants

India-based UFlex's international packaging film arm Flex Films has embarked on a global expansion drive with new production units in Europe, CIS Region, the Middle East and Africa. Akanksha Meena reports

The film manufacturing arm of UFlex, Flex Films International, has set up five new production lines including three new global locations.

'For us it has been very interesting year of global growth for Flex Films,' says Anantshree Chaturvedi, vice chairman and CEO. 'Because even though we are going through the pandemic – which was unexpected by all of us – we had gone into an expansion drive in 2019.'

“Flex Films’ strategy has always been to set up small facilities across the globe”

The company had planned five new lines at international locations including three new global sites – Poland, Egypt, Hungary, Russia and Nigeria. The biggest challenge for the company in 2020 was to complete these projects while ensuring high levels of safety for employees and innovating its way out of the problem of engineers not being able to travel. The company used a virtual engineering assembly system, body cameras and local training to get the new plants up and running.

'My prayers were answered when the Nigeria plant was ready by December 27, 2020. If I had missed the 2020 deadline, then I would have missed the deadline of starting all of the facilities within the 2020 time frame. It is one of the things we are extremely proud of,' Chaturvedi highlights. The construction of the plant in Nigeria has been completed and was commissioned in Q2 of FY2022 quarter.

Flex Films' strategy has always been to set up small facilities across the globe. This helps the company to be closer to customers, deploy better supply chain logistics, and counter geographical competition.

'To be honest, this was something we did basically to counter a lot of competition that is coming from South Asia. A lot of giant facilities are implementing 10 to 20 lines at a time – for us, that is not the model that we would like to emulate,' Chaturvedi adds.

The company has set up a BOPET lines in Russia, Nigeria and Poland; BOPP lines in Egypt and Hungary; and is setting up a CPP line in Dubai, UAE; and a CPP and BOPET plant in Karnataka, India. The BOPET plant in Russia has also been commissioned. The UAE and South India film lines are under construction. The total investment is valued at approximately 450 to 500 million USD. The plants have capacity of 18,000 to 45,000 tons per annum.

The company has commissioned its BOPET film manufacturing plant in the Ogun State of Nigeria with a production capacity of 45,000 tons per annum. Spread over 37 acres, the plant houses 10.6m BOPET film line in Africa and has two metallizers with a total production of 15000 tons per annum.

The plant created over 200 direct jobs and will meet the packaging film demand coming from the fast-growing economy of Nigeria, ECOWAS (Western Africa) and USA.

UFlex is also expanding its Asepto liquid packaging plant in Sanand, Gujarat, by 3.5 billion packs annually, taking the total capacity to seven billion packs.



Anantshree Chaturvedi, vice chairman and CEO, Flex Films International

Potential

According to Chaturvedi, the African market holds significant potential for the company. 'It is going to be a groundbreaking market not only for us as a company, but it reminds me of how I read the American market was in the 1950s. It was in America between the 1940s and 1960s when new industries and entrepreneurs emerged. The emerging middle class in Africa is similar to the dynamics that I witnessed in India between 2002 and 2016.'

Speaking of emerging markets, he adds that Russia was the 'next big surprise' for the company. 'Russia as a country is changing so much culturally and from a consumer perspective. Young people are very ambitious and driven to improve their standard of living and that is what drives real growth.'

'As an Indian by origin and an American citizen growing up in Asia and then getting a Western education, everything I learned about Russia was a lie. It is this growing, ambitious nation full of young people who are into technology and want improvement and tremendous exposure. They have amazing STEM (science, technology, engineering, and mathematics) skills,' he explains.

These are the two markets the company is 'very excited' about. In India, the company is setting up a plant in Dharwad. 'It's closer to Goa than Bangalore which I am happy about. It's closer to the beach than it is to a big city.'

Construction has begun and production will start around Q4 of year 2022. The bigger project (45,000 tons per annum) is the BOPET line, which will begin production in the last quarter of 2022. The CPP line (18,000 tons per annum) might kickstart production from Q3 of 2022.

UFlex has been posting double-digit growth annually since the mid-1980s. 'It's been a blessing but also a curse,' Chaturvedi points out. 'From the outside it seems like this is constant growth but it's not actually like that.'

Around 15 years ago, the company started its expansion outside of India. Its first international plant was established in the Middle East in Dubai. 'It taught us how to set up a project outside of your home country and manage it.'

From there, Flex Films expanded into Mexico, Egypt, Poland and

the US. The company finished its expansion in the US in 2013 and then took a pause. From 2013 to 2018, it consolidated and took the time to reach full capacity with its existing projects. It focused on fine-tuning and improving its product portfolio. 'We absorbed local and technical knowledge and used it to capture other markets.'

Within this ecosystem, the company was selling well in the African and Russian markets and realized that there was a growing demand in Europe. 'So the next phase of expansion that I mentioned previously was a natural thing for us in 2016.'

As a challenge, the company decided to go ahead with the expansion all at once. It did not want to lose market share in Russia, Europe or Africa.

'It seems like a large investment but if you look at our balance sheet, our EBITDA grew significantly during this time so our debt-to-equity ratio goes down even though we take on more debt for these projects.'

Chaturvedi explains that the company's strategy worked well during the pandemic. Global logistics were hindered and Flex Films was one of the companies that got unforeseen traction out of it due to its 'glocal' (globally local) operations. 'But the key challenge was to keep our people safe and maintain our safety standards to even a higher level that we usually do, because we could not afford to shut down for even a single day. We were in the "essential industry" from day one.'

The company saw a surge in polymer demand during Covid which Chaturvedi believes is temporary.

Project Plastic Fix

The company has been working on multiple sustainable technology projects to create a circular economy.

'Sustainability is one of my favorite topics to discuss,' Chaturvedi mentions. 'We as a company have been selling these products for the better part of the last decade. But the truth is that the real traction of sustainability only started at the turn of 2018. That is when this conversation about sustainability, about plastics polymers, started taking shape not just in India but globally.'

According to Chaturvedi, polymer has a 'stock and flow' problem. There is a stock of polymer that exists. Once discarded, single use plastic adds to the already existing stock. 'It either goes to landfill or hopefully it goes to a recycler and becomes something else. But if it does not do that it becomes waste. This also includes plastic electronic waste – something people don't even think about.'

The second problem is the flow of



Project Plastic Fix involves multiple sustainable technology projects

“The emerging middle class in Africa is similar to the dynamics that I witnessed in India between 2002 and 2016”

polymer. New plastic is being made every day. 'The way to solve this overall is to create a holistic project that we created a couple of years ago – Project Plastic Fix.'

Although Project Plastic Fix was launched in 2019, the technology to recycle mixed plastic waste was invented by chairman and founder of the company Ashok Chaturvedi in 1995. 'We were awarded for that technology. We were more concerned about polymer waste than anyone else because for us this is our survival. Solving this problem is of absolute acute importance because we don't want to make a product that nobody wants to buy.'

He says that while the technology to recycle MLP waste has been in existence since 1990s, it did not get noticed until the ban on plastic was implemented.

The company is working to establish recycling plants in Varanasi and Bangalore. Similar facilities will also be installed in Poland, Egypt and Mexico. These will be UFlex's initial showcase facilities and the company will then expand globally. The multi-layered plastic waste will be converted to granules to make more than 10,000 different products.

'We also want other entrepreneurs to buy this technology from us and set up their own facilities,' Chaturvedi adds.

The second part of the project is Pyrolysis, which Chaturvedi says is popular in emerging countries. It is conversion of polymer waste into energy. 'Our process

converts it into furnace oil and diesel fuel. The process does not emit any greenhouse gas or carbon monoxide. We have kept a filtration system such that it does not have any negative impact on the environment and is a complete clean transition into clean fuel.'

The company is also working to develop biofuel from plastic.

'The third part of the project which I'm really proud about is Asclepius, which was created by my team in the US.' The process involves converting plastic into up to 100 percent post-consumer recycled film. The company uses collected plastic waste and converts it back into original films for packaging.

'We have showcased studies that we did with one of our customers, UPM Raflatac, in the US. We have created a circular economy which actually works as opposed to a circular economy that only works in theory.'

Addressing the 'flow problem' Chaturvedi says: 'What do we do when consumer buys a package and is careless and leaves it in the garbage or tosses it on the streets? That is where our product Flexzyme comes into place.'

Flexzyme is a biodegradable technology which turns discarded plastic into sugar glucose molecules. 'Human beings in general are unaware of the fact that problems such as greenhouse emission, population and climate change are very hard to solve. But plastic is a solvable

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problem. In the long run, consumer demand combined with government regulations is going to drive this change, but right now we are very far away from that. Because now, things are driven by profitability and buying organic green plastic is still going to be more expensive than buying oil-based plastic. There is an efficiency that has been set up in the petrochemical supply chain of raw material to the polymer industry. The cost of organic plastic will become negligible with economies of scale, so you have to hit those economies of scale. Until you hit those economies of scale you will have the chicken and egg story.'

Flex Films is seeing growth in volumes of PCR and biodegradable films.

The company is testing its biodegradable packaging with Haldiram's, a popular food brand in India. Some of the brand's SKUs are 100 percent biodegradable using Flexzyme.

Chaturvedi adds that customers in the US are also using 100 percent PCR films that are not fossil fuel-based polymer and reduce emissions by 75 percent.

He points out that sustainability will be a huge trend in labels. 'Because in label manufacturing you are discarding a lot of polymer right from the B2B stage. So from a global perspective sustainability will make huge traction in labels. That's why our key customer in the US is a label manufacturer. They went ahead of the curve and started with our 90 percent recycled film and now our 100 percent recycled film.'

This trend is yet to catch up in the Asian market. 'But in the US and Europe, almost all kinds of labels are being manufactured with some kind of PCR, biodegradable-based polymer – and really biodegradable not oxo biodegradable.'

Digitalization in packaging

One of the other key trends that Chaturvedi sees is digitalization of packaging. He says that it is currently not being prioritized and today's consumers want their packaging to communicate. The industry is yet to fully explore its full potential, he believes. QR codes have begun appearing on packaging to provide information about the product along with website and video links.

He says that this trend is taken up by product segments where the consumer really cares what is inside that package, such as baby products, pet food, high-end consumer goods, cosmetics, nutrition products and pharmaceuticals. He adds that this will change how packaging uses ink, adhesive, printing technology and colors.

Digitalization of packaging is also going to be driven by e-commerce becoming a big space in the packaging sector, especially driven by the pandemic. Consumers in the Indian diaspora have become used



Flex Films' Hungary plant

“Our EBITDA grew significantly during this time so our debt-to-equity ratio goes down even though we take on more debt for these projects”



Flex Films' Poland plant

to ordering groceries. Different delivery mechanisms have emerged that are driving diverse needs for packaging.

'That's the evolution. Different printing and processing mechanisms will be needed for preservation of these goods while they are being transported, sold and allocated. The convenience of having e-commerce deliveries come to your doorstep and the fact that so many people have adapted to it is not going to go away easily. So that is one other emerging trend that I see.'

A third trend that Chaturvedi highlights is digital currency linked to waste. 'This is a trend that is more in the Western world because the West is not policing this mechanism as much as it is being policed in the East.'

Bitcoin – pegged to a certain tonnage of waste, including BOPP, glass and aluminum – is gaining popularity in the US and Europe.

'A different category of waste will be allocated to digital currency which will transform into an actual dollar value and real monetary system that can be used today.'

However, he says that India has not yet adapted to digital currency and Bitcoin. 'China's digital currency is doing well but is controlled by the government. It is policed and is not a fully formed independent digital currency.'

Digital currency could make waste to wealth a seamless process by cutting out the middleman. 'The process of buying waste off the street goes through five or six hands and then ends up at the recycler. The recycler then creates some value and puts it back. All that value gets eroded just by the people who are handling this waste in the middle. They are just doing logistics by getting the waste from one place to another. All that will go away – it will just translate straight down to a core rag picker or the person who is collecting it. Hopefully they will get a majority chunk of it and with few intermediary steps, the value of waste might remain the same. It will be a published value and nobody would be unaware of it.'

But the biggest shift that Chaturvedi sees is the global population increase. As the number of consumers grows globally, it drives demand for food and water, which need packaging.

'That's why you see these global capacities increasing and is the reason why all this investment is happening in this space. Packaging demand is driven by population.'



For more from Akanksha Meena on the Indian market, go to www.labelsandlabeling.com/contributors/akanksha-meena

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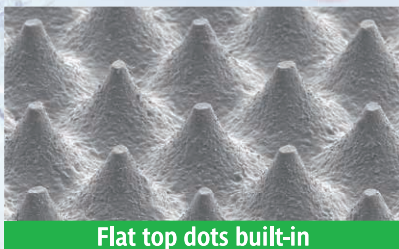
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Orianaa Décorpack diversifies and looks to invest

The Indian converter is diversifying into the wellness and pharma industries, which are both seeing accelerated demand due to the pandemic. Akanksha Meena reports



Yogesh Shahani, founder of Orianaa Décorpack

Vadodara-based label converter Orianaa Décorpack has added new label products to its portfolio including short-run flexo in-mold labels, digital PS sticker and shrink sleeve labels, with PE tubes in the pipeline. Company founder Yogesh Shahani speaks about his investment plans and the impact of Covid-19 on the business.

Founded in 2017, Orianaa is the result of the Shahani family's decades of label and flexible packaging experience. The company has a US partnership with Sam Anandani who started his career in packaging in 1990.

Yogesh Shahani, a civil engineer by qualification, initially planned to work in the construction industry. However, he was charmed by the label sector and joined his father's printing and packaging business in 1989. Bagging three big customers in his first market venture, it was as if he was 'labeled for the label industry'.

During his stint at his father's business, the company introduced shrink sleeves in 1996 and was one of the first in the country to do so. However, the family-run business saw several mergers and demergers through the years.

Orianaa was established with a focus on providing a range of labels including shrink sleeves, heat transfer foil labels and pressure-sensitive sticker labels. The company is now adding in-mold, digital pressure-sensitive sticker and stretch sleeve labels to its product portfolio.

'Over the years, we achieved an unparalleled mastery in gravure and flexo technology,' the founder says. 'We offer

“We did 30 percent more business than in 2019. Because of Covid, the hand sanitizer business went up by more than our expectations”

label-on-label, two-way printed labels, security labels, hanger labels, resealable and lockable labels (for wet wipes laminated pouch), jacketed sleeves, promotional shrink packs, collateral shrink packs, shape-cut sleeves and body label and tamper-proof seal (two in one).'

Spread across 117,000 square feet, the Orianaa facility is equipped with a 10-color gravure press and finishing equipment from Taiwan. It also houses an Omet iFlex 10-color flexo press and a flexo platemounting machine purchased at Labelexpo Europe.

Yogesh Shahani says that the family has been buying printing and converting equipment from Taiwan since 1987. He believes they are simple to operate and offer value for money.

Apart from the printing presses, Orianaa has in-house slitting, cutting and inspection capabilities. The converter also operates an in-house design studio with graphic designers well-versed in pre-press for digital, flexo and gravure jobs.

The company offers auto applicator machines for shrink sleeves made in Taiwan. 'The process waste from these machines is merely 1:10,000 against Chinese machines that incur 5:100 percent waste.'

Orianaa might opt for a combination press next, which would include flexo, gravure, screen, digital and offset capabilities. Thereafter, it might add a digital press to turn into a one-stop-shop for its customers.

In business terms, the pandemic was a blessing in disguise. 'We did 30 percent more business than in 2019,' says Yogesh Shahani. 'Because of Covid, the hand sanitizer business went up by more than our expectations. The pharma and hand sanitizer business was unexpected and made up for 75 percent of the business for initial few months of the pandemic. Since the pandemic prevented us from traveling for business, we saw our efforts more inclined towards digital media.'

However, Yogesh Shahani adds that he

would prefer to meet customers in person since virtual interaction is 'insufficient'. He says that physical exhibitions are a boon to any business which wants to remain in the limelight and allow networking opportunities with prospective customers.

Industry trends

Short-run labels are the upcoming trend in India, according to the company. 'One of the reasons is that start-ups are in abundance these days. MOQs (Minimum Order Quantities) have never been an issue at Orianaa, whether the requirement is of 10 labels to 10 million labels with minimum lead time (four days) and competitiveness on pricing.'

According to Yogesh Shahani, customers are looking for value-addition in labels. 'Seven out of ten label buyers demand matte and gloss effects after seeing our past work. We are observing a growing demand for shrink sleeves with foil-like, pearlized, metallic, spot matte effects. And for sticker labels, there is a demand for spot matte/gloss, cold/hot foiling, drip-off effect, special aqueous varnishes. We have come to a point where we can offer four innovations in one sticker label and we have noticed that these labels have a great demand not only in India but also globally.'

The Orianaa facility is BRCGS certified with grade A. It has cleared Social Responsibility Audit conducted by Intertek on request of its customer L'Oréal scoring 98 percent. The company claims that it will be a 'zero-defect company' by 2023.

The converter has won multiple awards including IndiaStar award in 2020 by the Indian Institute of Packaging and Outstanding Industrial Structure of Gujarat, 2020. Yogesh Shahani aspires to compete in the AsiaStar and WorldStar Award in 2021.



For more from Akanksha Meena on the Indian market, go to www.labelsandlabeling.com/contributors/akanksha-meena

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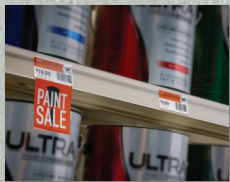
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Experts in "What If..."

Yingcai transforms to digital with Durst

A small converter in China has made a significant investment in a Durst Tau 330 RSC press to push forward its digital agenda. Yolanda Wang reports

Fan Fengzai, general manager of Yingcai Printing, says the Chinese's label converter's decision to transition to digital technology 'will power the future transformation and development of our company'.

Established in 2008 and located in Qingpu District, Shanghai, Yingcai is a comprehensive PS label manufacturer integrating R&D, production, sales and technical services. The company has been focusing on high-end label products in the cosmetics industry, and mainly serving the world's Top 500 cosmetic brands and relevant OEM manufacturers, such as Cosmax and many others.

Quality first

The rise and development of China's label printing industry has benefited from the so-called 'demographic dividend' – a vast consumer market and an abundant labor supply, which together have promoted the continuous development of cutting-edge industrial technologies.

On the other hand, the continued expansion of small and medium-sized label printing enterprises has made competition in the label industry more and more fierce. In addition, the rising cost of raw materials and the tightening pressures of environmental protection are adversely impacting the development of the label printing industry.

'Based on current business volume, Yingcai Printing can only be regarded as a small label printing company. So the question is how to survive, and even make long-term progress, in this increasingly competitive market environment?' comments Fan Fengzai, general manager of Yingcai Printing.

'The key point is to fully understand our own advantages, find out the overall positioning of the company, constantly optimize the company's production and service level, deeply explore the needs of the market, and provide the label products with best quality for customers.'

When starting his company, Fan Fengzai thoroughly investigated different end use markets for labels and discovered the huge market and future development potential of labels for the electronics and cosmetics industries.

After considering the very special requirements for labels in the electronics industry, he decided to focus on label products for the cosmetics sector, which then became the primary business field for Yingcai Printing.

Today, Yingcai Printing has 20 employees and a workshop with a floor area of 1,800sqm, which is divided into conventional printing, digital printing, post-press finishing, storage and delivery workshops.

The company is equipped with conventional printing equipment including Hontec 12+1 and 6+1 satellite letterpress machines, Reborn high-speed die-cutting system, Rhyguan die-cutting machine, Zhongheng inspection system, as well as digital equipment which now includes a Durst Tau 330 RSC digital press and Polly DGi-330 digital die-cutting system.

The cosmetics industry has very high quality and process requirements for its label products. The quality of the label not only directly affects the shelf appeal of cosmetics products, but also highlights the brand power.

'So we always put product quality in the first place. We are trying



Durst Tau 330 RSC installed at Yingcai Printing

“The question is how to survive, and even make long-term progress, in this increasingly competitive market environment?”

to create additional value for their product packaging, so as to achieve a win-win outcome with our customers,' Fan Fengzai tells Labels & Labeling.

Yingcai Printing has a wide range of quality control equipment in its print lab, including a light box with standard light source, adhesive tape peel strength tester, constant temperature and humidity test chamber, QD-3055 initial adhesion tape tester and QD-3056 tape retention tester.

This focus on quality over many years has allowed the company to gradually accumulate a number of very loyal global brand customers.

Digital

The investment in digital printing equipment is a milestone in the history of Yingcai Printing.

Considering the current production scale of Yingcai Printing, we have to say that a Durst Tau 330 RSC digital press represents a stunning scale of investment for the company.

'Many peers in the industry had doubts once they heard about our investment plan: why would such a small label printing enterprise invest in such high-end digital printing equipment? What supported such a bold investment?'

L&L had the same questions.

This is the third Durst Tau 330 RSC digital press installed in China, only two months after the first installation at Shandong Golden Realm.

'To be honest, it was me who took the initiative to contact the



Fan Fengzai, general manager of Yingcai Printing, with L&L's Yolanda Wang

“Many industry peers had doubts once they heard about our investment: why would such a small label converter invest in such high-end digital printing equipment?”



Polly DGi-330 digital die-cutting machine at Yingcai



Digital printing and processing equipment is a supplement to the existing conventional production equipment at Yingcai

supplier and bought this Durst press, and it only took me a very short time to make this decision,' Fan Fengzai says. 'I had never seen this device before installation, and I had never even seen any sample of its production. However, with years of experience in the beauty and cosmetics label market, I am very clear about what kind of label products we need to produce and accordingly what kind of digital printing equipment we need to introduce.'

For this investment, he is clearly focused on two points: first, digital transformation is the inevitable direction of the future development of Yingcai Printing; second, the company's mainstream product is the label for the cosmetics and beauty industry.

Fan Fengzai continues, 'At present, Durst does not have much of an installation base in China, but I do know that they have installed more than 20 systems in South Korea, where the cosmetics and beauty industry is well developed.' This was a key factor contributing to Yingcai Printing's investment in the Durst press.

Digital printing and processing equipment is a supplement to the existing conventional production equipment at Yingcai Printing. Its role is to effectively improve the overall production capacity and service level of the company and provide technical capabilities and support for innovative label products.

'As more and more millennials, Generation Z and Generation α become the main consumer force, the benchmark brand owners in the cosmetics industry put forward higher requirements for the production process, delivery time and technical innovation of label products. Investing in digital printing can not only meet the needs of customers, but also provide them with more personalized and variable creative products and solutions.'

The 'Qingpingle' series of label products produced by Yingcai Printing also won the Gold award in Durst's 2020 RSC Label Masters competition and were exhibited at the Durst Customer Experience Center at Bressanone, Italy.

Ready for the future

'I know clearly that Yingcai Printing does not have the scale advantages in terms of equipment, personnel, capital and so on compared with some of the leading label converters such as CCL, All4labels, Cymmetrik, Jiangtian and Meikei,' Fan Fengzai admits candidly.

'If we try to strive for some large orders – for example, those with a value of more than 5 million RMB (7.75m USD) – we will not give full play to our unique advantages and may also expose ourselves to shortcomings in service and delivery of long-run orders,' admits Fan Fengzai.

One cosmetics brand owner, for example, needs both big volume label orders to support popular products and small orders of personalized and innovative niche label products. The target business of Yingcai Printing is just these small, bespoke label orders.

The investment in digital printing and finishing equipment is the first step of Yingcai's digital and intelligent transformation for the future. In 2021, the company's investment in new equipment will reach 30 million RMB (over 4.5m USD).

Today the company is building its own plant in Songjiang District, Shanghai, which will focus on digital printing and contract packing. The new plant is expected to be in full operation this month, and a newly purchased HP Indigo press will become the first equipment to be installed there.

'Moreover, we also hope that this new digital printing and processing technology can attract a group of young workers in this industry so we can develop a reserve of future talent and ensure the future development of the company,' concludes Fan Fengzai.



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

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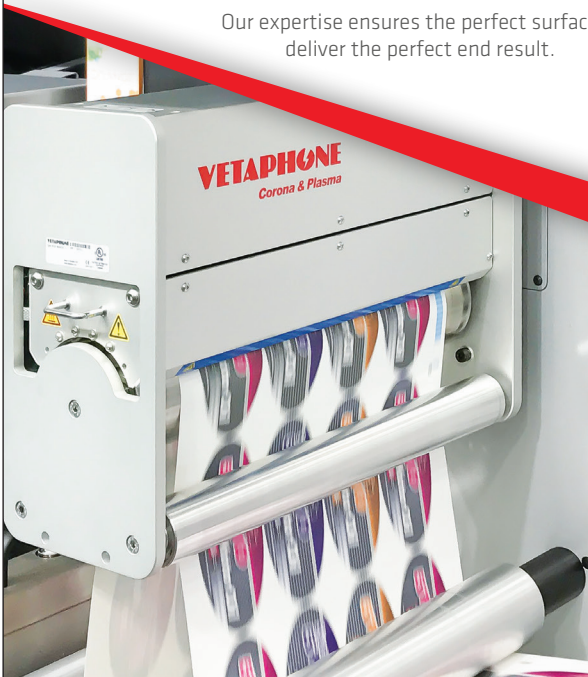
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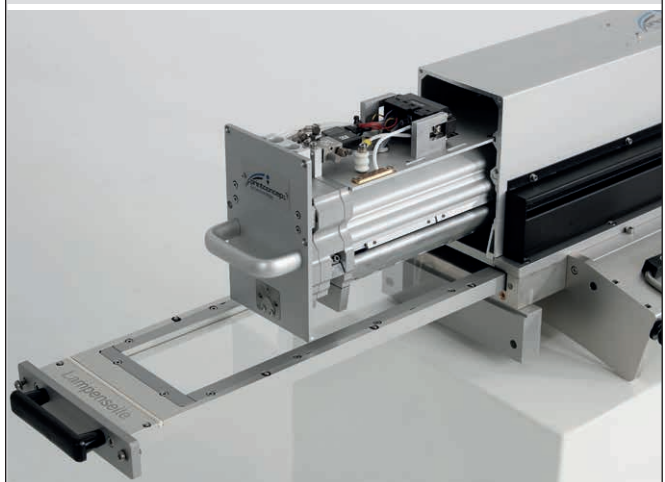


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TLMI honors industry leaders

At the TLMI Annual Meeting, the association presented its converter, supplier and volunteer of the year awards. Luis Rodriguez reports

Craig Moreland, CEO of Coast Label, was awarded the TLMI Converter of the Year, which recognizes a member of the North American package printing industry who has made extensive contributions to the labeling marketplace and has additionally demonstrated a strong commitment to the association.

In 2004, Moreland joined the association and attended his first meeting. He has since served as chairman of the board for two years and has been on the board of directors since 2010, where, according to TLMI, he has been one of the association's most influential committee chairpersons.

'Craig Moreland's contributions to TLMI are many. During his tenure as TLMI Membership Committee chair, he led his committee

“During his tenure as TLMI Membership Committee chair, Craig led his committee to reaching unprecedented levels of new converter and supplier members”

to reaching unprecedented levels of new converter and supplier members. During his time as vice chairman and chairman of the board, he was influential in presiding over the retirement of the association's president of almost two decades,' said Linnea Keen, president of TLMI. 'He played a critical role in keeping TLMI on track during what could have been an extremely tumultuous transition. Craig is a true leader in every sense of the word, and it has been an honor working with him. I want to personally thank him for his many years of service and all that he has done for the association and to congratulate him on receiving this tremendous honor.'

During the ceremony, Moreland spoke of how he pulled together funds and borrowed a portion of the sales cost from his father to purchase the company, and then convinced the company's original owner to carry the note for the remaining amount. Under Moreland's guidance, Coast Label has shifted from a flatbed letterpress company to the flexographic and digital print house it is today, serving a wide range of end user segments and applications.

Steve Schulte, vice president of sales and marketing at Mark Andy, was presented the Supplier of the Year honor, in conjunction with Labelexpo Americas. Having served on the TLMI board of directors and the association's marketing committee, Schulte is a longstanding committee member for the TLMI Print Awards.

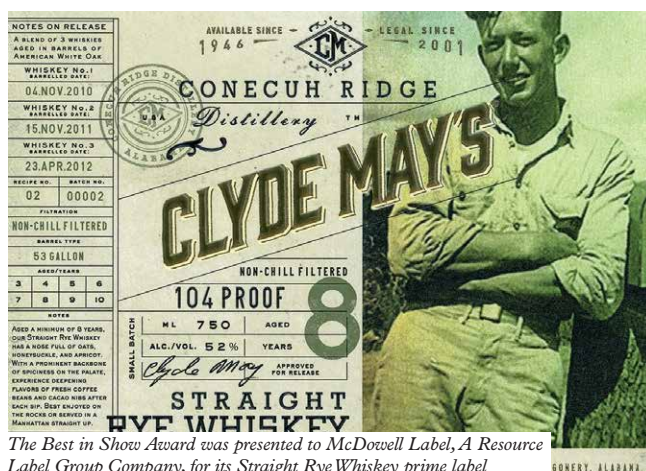
'Steve Schulte exemplifies a highly engaged, personable, and hardworking TLMI supplier member,' said Keen. 'He is a trusted friend, colleague and mentor within the association and having served on the TLMI board of directors alongside Steve, I can attest to how dedicated he is to TLMI and to lending a helping hand to any member in need. Steve has extensive knowledge surrounding print technologies and his experience in the industry has been a great asset to TLMI on both a technical and personal level. I want to congratulate Steve on this well-deserved honor personally.'

Brian Hurst, vice president of manufacturing at Yerecic Label, was awarded with the TLMI Volunteer of the Year award. Hurst has been at Yerecic Label for nearly three decades and has served in his current position for over 15 years.

'Over the years, Brian has been a hardworking association



Linda Casey of Packaging Impressions presents Craig Moreland with the TLMI 2021 Converter of the Year Award



The Best in Show Award was presented to McDowell Label, A Resource Label Group Company, for its Straight Rye Whiskey prime label

committee member, a technical resource, a cherished colleague and a friend to all who have had the opportunity to work with him. He never misses a TLMI event, and we have all come to rely on Brian for his expertise and unfailing camaraderie,' said Keen. 'I want to congratulate Brian for this achievement personally and to thank him for being one of our most devoted members.'

Annual Print Awards

Winners of this year's TLMI Annual Print Awards competition were announced by Judging Committee chair, Paul Teachout, business development manager, narrow web, at Anderson & Vreeland.

Over the past year, narrow web converters from across North America submitted nearly 200 entries. A panel of 12 judges, each representing a different TLMI supplier member, closely examined all submission to ultimately award seven Best in Class entries and one Best in Show. A total of 59 awards were presented including 33 first-place winners, 26 second-place winners, seven Best in Class winners and one Best in Show. The Best in Show Award was presented to McDowell Label, A Resource Label Group Company, for its Straight Rye Whiskey prime label. The label mimics the textured processing papers from the prohibition era and featured solid foil stamping and doming. It was also awarded the Best-in-Class honors in the Wine & Spirits – Color Process – Prime category, making it eligible for the Best in Show honor.



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New look for craft beer

As aluminum cans become harder to source, craft brewers are looking to converters for alternative labeling techniques to cover the surplus of printed cans sitting in warehouses.

Luis Rodriguez reports

Maneuvering around the materials shortage and supply chain disruptions is an all-too-common practice that practically every industry has been dealing with for the past year and a half.

In the craft brewing business, blank, unprinted aluminum cans have been increasingly difficult to acquire, leaving some brewers without any cans at all and other with an excess that were previously labeled for batches that weren't filled. So, what have these brewers been doing with the previously labeled cans for beer that hasn't been sold?

To make the best use of what they have in storage, some craft brewers and microbreweries have looked to converters to help them pivot to shrink sleeves and pressure-sensitive labels to cover the old label with a fresh one.

'When Covid hit, we had more than one of our microbrewery customers call us up saying they needed some sleeves for cans and they needed them fast, because everything they had in vats that used to be sold to restaurants and hotels got canceled due to shutdowns,' says Mike Willeford, general manager of Wind Walker Label.

As of now, these methods are typically being used to salvage what was already printed and stored to maintain business in a world where unpredictable challenges continue to surface. But will this trend continue past the point where materials are easier to come by and the supply chain is stable, or will the industry roll back to the direct-to-can printing method that has been the mainstay in the brewing industry for years?

Craft brewing in the US

Though craft brewing has been around in parts of Europe for centuries, it didn't truly exist in the United States until the late 1970s and didn't hit its stride until the early 2000s. From 2006 to 2020, the number of craft brewers rose from 1,409 to 8,764, representing an annual growth rate of 37.28 percent, according to the Brewers Association, a not-for-profit trade association for craft brewers in the United States.

Is a craft brewer a mom+pop shop that works out of the garage, selling a few cans of beer and kegs to the local bars and markets around the neighborhood? Or is

it a brewing company that works out of a warehouse with a staff of 20+ employees maintaining a few 1,000-gallon tanks and national shipment routes to liquor stores around the country? The answer is both, which is a unique problem in the US compared to Europe.

'What the US defines as a craft brewer can be seen as a significant brewer in mainland Europe and the UK,' said Richard Howlett, global product line leader of Accrply. 'When we refer to a craft brewer, it's literally a craft industry. It's a small family company in someone's garage. Whereas in North America, when referring to craft brewing, it's almost literally just a brewery. It's at a different scale.'

While the industry has been growing for nearly two decades, with retail sales worth 22 billion USD in 2020, not every craft brewer is seeing a high enough profit margin. A deeper dive into the numbers reveals that a majority of the 8,764 craft brewers in the United States are the small mom+pop shops. What should these craft brewers do when facing another year of disruption in the supply of blank aluminum cans?

For the foreseeable future, the answer looks to be in the labeling.

The shortage of blank aluminum cans



Samantha Itzkovitz, VP of marketing for Brooklyn Brewing, says the company uses direct-to-can printing unless it's dealing with much smaller quantities

is a serious problem which can mean the difference between whether a brewery survives past the global pandemic, or folds. Direct-to-can printing may not be an option for those who don't have direct access to a significant supplier. As of now, the two best alternative options are shrink sleeve and pressure-sensitive labeling.

Shrink sleeves

As one of the fastest-growing label formats, shrink sleeves can provide a unique opportunity to craft brewers, as they provide full coverage of the can. But this format hasn't historically been the first choice for many brewers.

'Shrink sleeve has typically, at least

“Because of the supply and cost issues, we're starting to see a real high-volume acceptance of using shrink as a primary marking, even above the painted can”



Lauterbach Group's HP Indigo 8000 is used to print practically all its shrink sleeves and PS labels for the craft beer sector sensitive

from my experience, become a fallback for some of those medium-to-large sized breweries, who would typically be doing to direct-to-can printing,' says Ryan Wheaton, founder of Craft Brew Creative, a branding, design and marketing company for the craft brew industry.

Even though the labeling format is growing across many markets, the term 'fallback' doesn't make shrink sleeving sound too enticing for brewers. However, in comparison to direct-to-can printing, some converters believe that sleeving has more added benefits than just covering an old label. One of which is helping brand owners to stand out on shelves.

'Because of the supply and cost issues, we're starting to see a real high-volume acceptance of using shrink as a primary marking, even above the painted can,' says Shane Lauterbach, president and CEO of Lauterbach Group. 'This is partly because of all the decoration and embellishment type opportunities they can be doing for the can to draw attention to the brewers' product on store shelves.'

Using an HP Indigo 8000 digital press and sophisticated finishing equipment, Lauterbach is able to provide customers with embellishments such as cold foils, holographic effects, tactile varnishes, fluorescent inks, metallic inks and invisible inks. All of which are important when a product has roughly 13 seconds to stand out from the competition on the shelf in a market where competition isn't just a handful of other companies, but thousands.

'The sleeve gives them 360 degrees, which gives them a lot of opportunities to do marketing, like games, competitions, giveaways, and some other innovative stuff,' says Lauterbach. He adds that these design opportunities just aren't possible with direct-to-can labeling as it's not as flexible as shrink sleeve and typically requires a minimum order of roughly 100,000 cans.

The flexibility of shrink sleeving is one of the reasons for its growing acceptance

"The majority of people that I've worked with are using pressure-sensitive labels. You can print just 1,000 labels compared to the pallet-sized orders of shrink sleeves"

in the craft brew market. According to Lauterbach it gives companies a better way to manage inventory as, when blank cans become more readily available, they will no longer have to order large numbers of cans with just a single SKU. This is especially worthwhile in the craft brew industry where new flavors and SKUs are being produced on not only just a seasonal basis, but almost monthly for some.

So, why hasn't shrink sleeve become the primary form of labeling across the craft brew market?

As said earlier, with nearly 9,000 craft brewers in the United States, the market is extremely competitive. And with many brewers being individuals who are seemingly in the industry for the craft of it, procuring aluminum cans while also paying to have them sleeved can be a steep point of entry – they may not be producing enough beer to necessitate the minimum order quantity to begin with.

'There are minimum orders on shrink sleeves of about a pallet, which is enough to cover about three to four thousand cans,' says Wheaton. 'So, for some of the smaller breweries, it ends up not being as cost-effective because you're dedicated to ordering so many.'

Outside the purchase of physical sleeves and cans, the canning lines, applicators and steam or heat tunnels necessary to shrink the sleeve also necessitate a substantial capital investment before a brewer can be ready for shrink sleeve. To this Lauterbach adds that when purchasing equipment to expand into sleeving, brewers must ensure that the equipment that's being purchased is expandable and flexible, so as not to be

stuck with obsolete equipment taking up precious space on the plant floor.

Another consideration is that brewhouses need to ensure that they have an operator who knows how to handle the equipment, as shrink sleeving can be a demanding and exact process.

'Although an aluminum can is parallel sided, it is quite challenging to achieve the high level of shrink and distortion needed to get high-quality print on the can,' says Howlett. He adds that the capability provided by digital printing to add more complex short run graphics makes this an even more difficult process. 'If you're asking for one heat source or tunnel to shrink multiple different SKUs, multiple different designs, it actually needs to have a very large process window and a lot of flexibility, whereas in shrink sleeves, the more time you spend in a tunnel, the more control you have over the shrink.'

Though shrink sleeve does have a high initial investment, for the medium or large size brewers converters agree that it is the most logical answer to covering the direct-to-can labels. But what about the microbreweries that may not have the capital to invest in the equipment or pallets of shrink sleeves?

Pressure-sensitive labels

As the fastest-growing labeling format, pressure-sensitive labels have become the first choice for those microbreweries whose objective in becoming a brewer was not necessarily to become the next big thing, but rather just for the craft.

'The majority of people that I've worked with are using pressure-sensitive labels,' says Wheaton. 'Just because it's way nimbler. You can print just 1,000 labels compared to the pallet-sized orders of shrink sleeves.'

Though a cost-effective and flexible alternative to shrink sleeves, and providing a similar wraparound coverage, Willeford still sees the use of pressure-sensitive as a stepping-stone rather than the answer.

'I always viewed the pressure-sensitive on cans as kind of a desperation measure for when companies can't afford printed cans. They try to apply the pressure-sensitive label with the hope it goes on straight,' says Willeford. For the most part, these companies have to apply the label after the can is filled because it wouldn't be rigid enough otherwise.





Pressure-sensitive label printed by Lauterbach Group



Craft Brew Creative works with craft brewers to help design packaging, merchandise and branding

“The aluminum can shortage is creating an opportunity for the craft brewer to understand its inventory and capital”

Another issue is durability. ‘The materials for the labels need to be durable enough to be thrown into cases, stacked up on a pallet, shipped, and be put on shelves,’ says Wheaton. ‘And then there’s the whole concept of the ice bucket challenge where if you’re using a paper label and it starts to get wet then it just peels off.’

This is one of reasons that the use of pressure-sensitive labeling has somewhat faltered, according to Willeford, although materials are available durable enough to withstand being immersed in water for a long period of time.

Another issue for self-adhesive is recyclability. Though simple and affordable, pressure-sensitive labeling affects the recyclability of the aluminum cans, which is a serious problem to craft brewers who tend to share ‘grassroot and organic’ traits along with their customers. However, there have been advancements with pressure-sensitive labels in terms of recyclability on the material providers’ side.

‘We work with the APR, MRFs and recyclers to ensure our pressure-sensitive labels do not hinder the recycling process,’ says Sarah Sanzo, compliance and sustainability manager at Avery Dennison. ‘With these insights the entire label industry is working toward the same goal thus creating a larger economy for recyclers.’

Currently, it seems that pressure-sensitive

labeling isn’t catching on as well as shrink sleeving. But are these labeling methods just ways to make do in the face of the blank can shortage?

The answers vary, but the tried-and-true method of direct-to-can printing looks set to continue being the leading form of labeling when the supply chain situation returns to normal.

‘We run all of our cans direct-to-can unless we’re dealing with specialty or much smaller quantities,’ says Samantha Itzkovitz, vice president of marketing for Brooklyn Brewing. ‘It’s more cost-effective when producing at high quantities.’

However, there seems to be an area where shrink sleeve and pressure-sensitive labeling can take hold, and that is with the variety of SKUs and run lengths.

‘There’s still a place for shrink sleeve in this industry, and there seems to be a sweet spot where if these medium-to-large sized breweries are running enough small and medium sized runs, it makes sense to jump into sleeve,’ says Wheaton. This seems to be a shared sentiment among converters.

‘We can run SKUs as small as 5,000 for shrink sleeve and nobody is going to do a run length on a printed can that small,’ says Willeford.

Lauterbach adds that the added benefit to running these shorter SKUs and run lengths also give craft brewers flexibility. ‘In my opinion, the aluminum can shortage, just like the materials issues in the label industry, is creating an opportunity for the craft brewer to understand its inventory and capital. It’s forcing people to be better managers of their capital, and I don’t think that goes away. I think the shrink is the perfect opportunity to optimize cash flow, profitability and flexibility so that they can react to their markets and what the clients are looking for. It’s a neat opportunity for everyone involved.’



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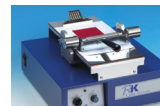
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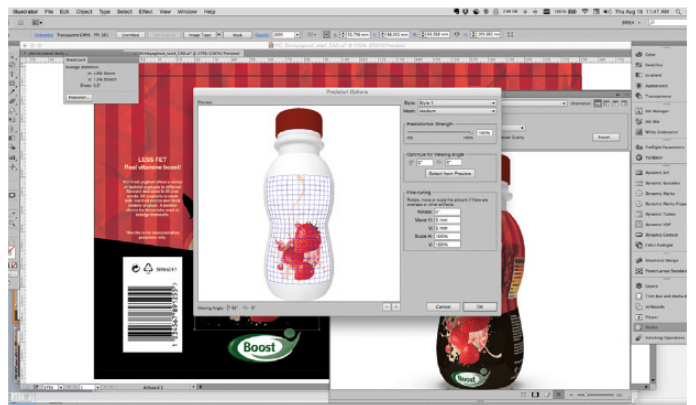
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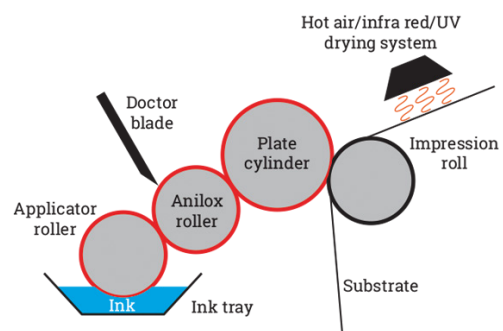
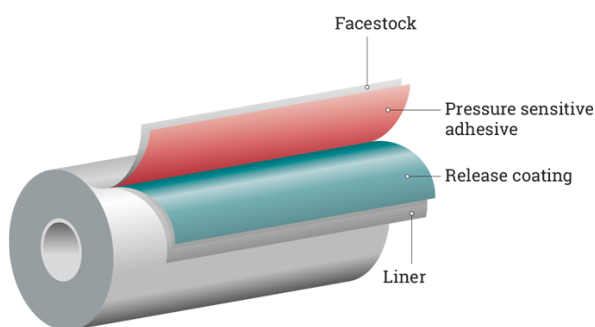


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Applicators hold key to new PS technology advances

PS label technology advancements can stall because of hesitancy to convert production lines with new applicators. Jordan Hart reports

Last issue Andy Thomas-Emans reported on applicator bottlenecks, specifically that 'no matter how efficient, or sustainable a new label technology may be, there is an enormous amount of "investment inertia" in the installed label applicator base'. When brands have invested significant amounts of money and time in setting up an efficient and smoothly running production line, why would they want to disrupt the status quo and invest in new equipment, which will cost them both in machine costs and downtime in production? This is the question L&L set out to investigate: how do companies convince brands to invest in new labeling technology?

L&L investigated two promising technologies and spoke to applicator manufacturer Herma to see how these companies overcome end user hesitancy.

Actega's Signite

Signite decorating technology, developed by Actega, essentially prints a label in reverse. The label substrate is printed as a spot or continuous coating. Process colors are then applied in reverse order, followed by an adhesive layer. These layers are all deposited on a reusable carrier with a release coating on the back to stop the adhesive sticking when the roll is wound up. Signite eliminates siliconized release liner and filmic face material, with no wastage from die-cutting and matrix removal, since all coating and print layers are deposited only on the image area.

Actega claims the technology can reduce label waste by over 50 percent – depending on the decoration design – compared to a similar footprint pressure-sensitive label, by eliminating matrix waste, reducing decoration thickness by around a third and eliminating substrate in non-print areas.

The technology is initially focused on glass cylinders, with plans to expand into aluminum and eventually asymmetrical containers.

This promising new technology requires dedicated application equipment. Actega was in the unique position of controlling the engineering and development of the hardware applicator and as well as the coating technology. L&L spoke to Anthony Carignano, technical director of marketing for Signite at Actega North America Technologies, to learn more about Actega's plans to overcome brand owner adoption hesitancy.

L&L: Who are you aiming to sell Signite applicator technology to: converters, brands, contract packers?

AC: At the moment, it is really all of the above. In addition, Covid has skewed a lot of the dynamics relating to the supply of packaging materials and willingness of brands to commercially scale new decorating processes. So, we have started to branch out to Signite application adjacencies. For example, we really see that there is a home for Signite in the candle industry with candle glass. There is a lot of pressure sensitive labeling used in candle glass and we think we have a very strong value proposition in this area.

L&L: Major technology advancements sometimes stall because of hesitancy to convert production lines with new applicators. Is this a concern and how do you plan to overcome it?

AC: Yes, absolutely it is a concern for us. The reality is that the best way of transferring an ultra-thin film, a polymeric decoration image,



The Signite applicator machine

“When brands have invested significant money and time in setting up a smoothly running production line, why would they want to invest in new equipment”

is by using our applicator hardware. We built a fleet of approximately 20 applicator hardware systems and are in the process of placing them in relevant homes. We know that simply to say to somebody, 'Here is the chemistry, here is how to print it, now you figure out how to put it on a bottles yourselves', is just not practical. So, we decided to go ahead and make the investment in the hardware applicators to facilitate and make commercialization of Signite happen.

We have also found out that for the short-term the best, most reliable way of transferring a Signite decoration over to a glass bottle is by using a flamed surface pre-treatment. We realize that not everybody considering adoption of Signite currently has flame pre-treatment capabilities in-house. So, in addition to supplying the Signite applicator machinery, we are working with some of our highest prospects to assist with procurement of flame pre-treatment equipment. Additionally, we are going to be integrating flame pre-treaters on the applicator machine so that it will be a lot easier for that brand or decoration house to use our technology.

L&L: What is convincing brands to take the time to convert their production lines?

AC: In certain cases, brands have signed a McArthur Foundation commitment for sustainability, and they need to show even with glass packaging that they are thinking about sustainability. Others, particularly within the cosmetic space that are leaders in sustainability, are saying: I want your technology because it demonstrates that I am thinking about how to reduce the amount of materials that are used and that are landfilled to decorate my containers.

Other brands will say, 'We really like your technology but there is no way we can get one of your applicators, we don't have the footprint or the people to manage it. You are going to have to go out and find a bottle decoration house that's willing to adopt your technology and do the decorating of the bottles for us.'

Additionally, we have actually opened a pilot line within our Rhode Island facility where we are open to decorating for smaller brands. We have set up our own pilot line workshop to do the decorating ourselves in East Providence.

Given that we have a Mark Andy hybrid digital press, along with flame treatment and Signite hardware applicators, and a highly capable and multi-disciplinary team of chemist and engineers within our East Providence in-house start up, we decided that a working Signite demonstration center would be a novel way to show people how this technology is printed and applied. The hope is that the Signite demonstration center will allow us to seed brands with Signite so that it will take off.

In addition, we are willing to allow our in-line hardware application equipment to be used on location for several months before the equipment is invoiced and paid for. For contract decorators, co-packers and brands to gain Signite commercial traction, they need to have their salespeople go out into the market to evangelize the value of the technology before end customer adoption takes place.

We know this process takes several months, and that is why we are willing to allow relevant placement locations to experiment with and become accustomed to the equipment, get product out in the field, and ultimately get brand owners interested in adopting Signite.

L&L: What are you competing against in the glass decorating realm?

AC: We are competing against a few indirect and direct printing technologies but primarily against no-look pressure-sensitive labeling. However, we don't print onto a facestock; we print directly onto the carrier film. If you compare our technology against a



An example of Signite technology on tequila and bourbon



ABInBev used Ritrama's Core Linerless system for its Flying Fish beer line

“What ultimately counts for a customer is overall equipment effectiveness, and that means keeping machine downtimes to a minimum”

conventional wash off, no-look pressure-sensitive label, we are saving at least 50 percent raw material because we don't use a facestock. In addition, we are drastically reducing the amount of chemistry that is required to form an image on a glass container. We also are competing against shrink sleeves, screen printing, and direct to object printing.

Ritrama's Core Linerless

Ritrama previewed Core Linerless Solutions (CLS) back in 2013; the company developed the labeling platform in collaboration with ILTI (Italian Labelling Technology Industry) to target home, personal care, and beverage industries. At the time, as L&L reported, Ritrama regarded CLS as 'an evolution of pressure-sensitive technology rather than a replacement'. As far as the converter is concerned, printing on a Core linerless web is exactly the same as printing on a conventional pressure-sensitive label web – the printed web is converted to a linerless web after printing on a specialist converting machine supplied by Omet.

The Core applicator built by ILTI, the Proper-LL, allowed for easy changeover in under a minute from conventional pressure-sensitive to linerless modules. This is an innovative and waste-reducing technology, but as Andy Thomas-Emans wrote in L&L issue 3, 2021, it still requires investment 'in a dedicated applicator machine manufactured by ILTI, and this has limited the technology's market penetration.'

In November 2019, South African

Brewery, part of ABInBev, became the first company worldwide to adopt Ritrama's complete Core linerless system (CLS) to label its Flying Fish beer line before expanding to the full product portfolio. ABInBev estimated that changing to CLS reduced waste by 57 tons per year just for Flying Fish beer in South Africa.

L&L sat down with Sergio Veneziani, global product manager linerless, at Fedrigoni Self-Adhesive (part of Fedrigoni Group, which acquired Ritrama in 2020) to learn more about the project and the process of getting brands to adapt to new technologies and applicators.

'The technology was previewed in Labelexpo in 2013 when the former Ritrama organization presented the preview of the idea. At the time it was at a very preliminary stage, but they wanted to see the market reaction,' says Veneziani. 'Having seen that there was very big interest and a big reaction from the market, from both brand owners and converters, then a specific project with specific investments were made in order to complete the development of the platform. It took a while because we realized that in addition to the new label base materials, we needed specific partners to develop the label converting process; this part was covered by several partners, Omet for the lamination module, Spilker for the finishing module and Catchpoint for the microperforation.'

The biggest reason for brands to change their packaging and labeling is for sustainability benefits, according to

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Veneziani: 'At least in Europe, sustainability is a top priority for all the big brand owners. In every discussion about new projects and new product packaging, all these discussions are characterized by a strong focus on sustainability. Practically all the big brands are trying to comply with the new regulations in terms of waste elimination and recyclability. This is how CLS is trying to position itself in the market, as a solution that addresses both of those sustainability concerns.'

Fedrigoni credits the modular design of the technology as creating a low barrier to entry for brands and converters adopting the technology. When it comes to convincing companies to adopt CLS, Veneziani says: 'Brands are the ones initially showing more interest, of course. They are the ones having targets to achieve, and having the need to reduce process waste, and to offer more options for sustainable products to their consumers. It is the sustainability element that is the driving factor for brands to convert their production lines.'

He continues: 'When there is a brand interested in exploring the technology, then we need a label converter on board to be able to produce the necessary sampling to allow the brand to touch and see the result.'

For converters, Veneziani says it just depends on their readiness to be innovative. 'There are capital investments required for converters. We see some converters ready to make this investment only if there is an end user on the other side ready to commit to help them justify the investment. It's a three-party game: we have the technology, we need the brand to make a pull, and then the converters will react.'

Herma

Switching from a technology focus to a dedicated applicator manufacturer, let's look at Herma. The company manufactures many different labeling applicator machines, including a recently launched linerless system called InNo-Liner. This system, which found success in the shipping label sector, can apply labels to shipping cases of different sizes fed to the applicator in any sequence. Herma says the use of linerless in these kinds of applications removes thousands of tons of siliconized paper liner from the waste disposal chain.

Christos Kaisoudis, head of sales for Herma Labeling Machines, has found that brands are agreeable to changing over production lines as long as the technology justifies the transition.

'Customers actually find a whole range of new technical features so fascinating that it encourages the decision to invest precisely because these features deliver measurable time savings,' says Kaisoudis.



Herma InNo-Liner applicator machine

“If a new labeling technology reduces waste and increases sustainability, brands and converters are more likely to make the switch”

'What ultimately counts for a customer is overall equipment effectiveness, and that means keeping machine downtimes to a minimum.'

When it comes to convincing brands to switch to linerless, Kaisoudis credits sustainability and raw material shortages as key arguments.

'Let's start with sustainability: more and more companies are making intensive efforts to reduce their carbon footprint. If your company is sending a lot of parcels, you'll need a lot of shipping labels. Previously, each mailing label required a piece of backing material of the same size, which was no longer of any use after the label was applied, and it needed to be disposed of in a time-consuming and sometimes costly manner. This backing paper is no longer needed in the Herma InNo-Liner system. The savings as well as the reduction of the carbon footprint can be calculated easily and persuasively.'

He continues: 'We're now also experiencing a strong push due to raw material shortages. The market for particularly tear-resistant glassine papers that can serve as siliconized backing material for labels is tight. This is turning into a problem in terms of space, especially when large quantities of labels are needed – mainly in shipping and logistics centers. A whole range of companies are keenly interested in solutions that no longer

require paper substrates. These companies aren't concerned with replacing the classic adhesive labels; instead, they want to quickly gain experience with the new technology so that they have multiple options in the future, in case bottlenecks occur.'

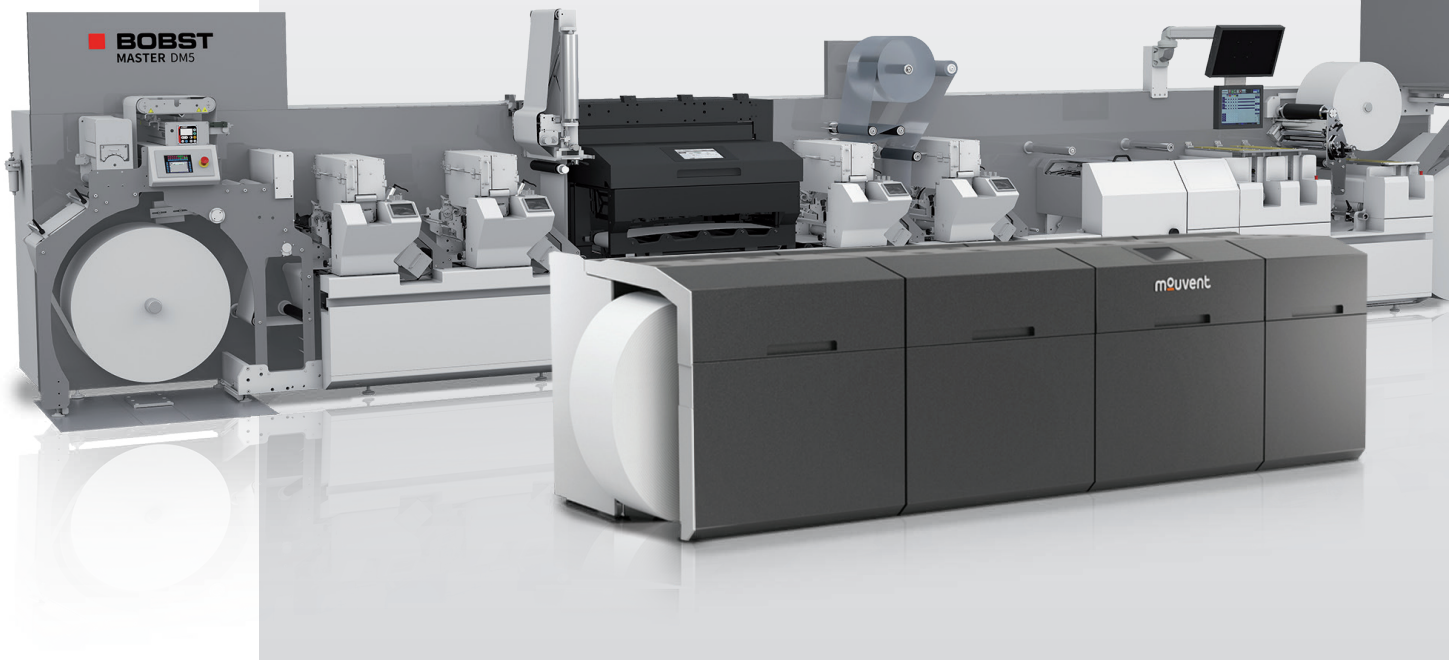
Conclusion

It is clear from these three interviews that brands can be persuaded to switch applicator technologies if a new technology can make significant and measurable improvements to the brand's current pain points. For many, that is sustainability goals. With more and more companies signing environmental commitments, there is more pressure than ever to be a good steward of resources and reduce waste. If a new labeling technology reduces waste and increases sustainability, brands and converters are more likely to make the switch. To avoid companies getting cold feet when it comes to installing a new applicator machine, the hardware transition needs to be as seamless as possible for converters and the benefits need to be significant for the brands adopting the new technology.



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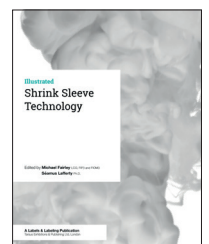
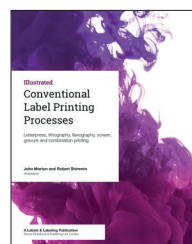
Technology has brought more control, automation and sophistication to every stage of the label and package printing process – from a customer placing an order to receiving it. This is creating vast opportunities for converters, as well as adding complexity to project management.

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Proofing: a snapshot in time

Tom Kerchiss, MD of RK Print Coat Instruments, on the challenges and importance of proofing

Up until comparatively modern times, packaging – and to some extent labeling – was regarded as an unavoidable cost center. In earlier times, when the superstore was little more than an ambitious concept, multi-national food and beverage organizations were few and consumer choice was limited, packaging converting focused almost entirely on providing containment and protection. Print processes such as flexography were not the powerhouses of productivity that they are today: speed of output was limited and so too was quality – but then again everything was limited: a limited choice of substrates and little incentive to add value and exploit decorative possibilities. How the package or label looked was by modern standards of marketing scarcely thought about. That was then, this is now. Priorities and expectations are now, by any standards, high.

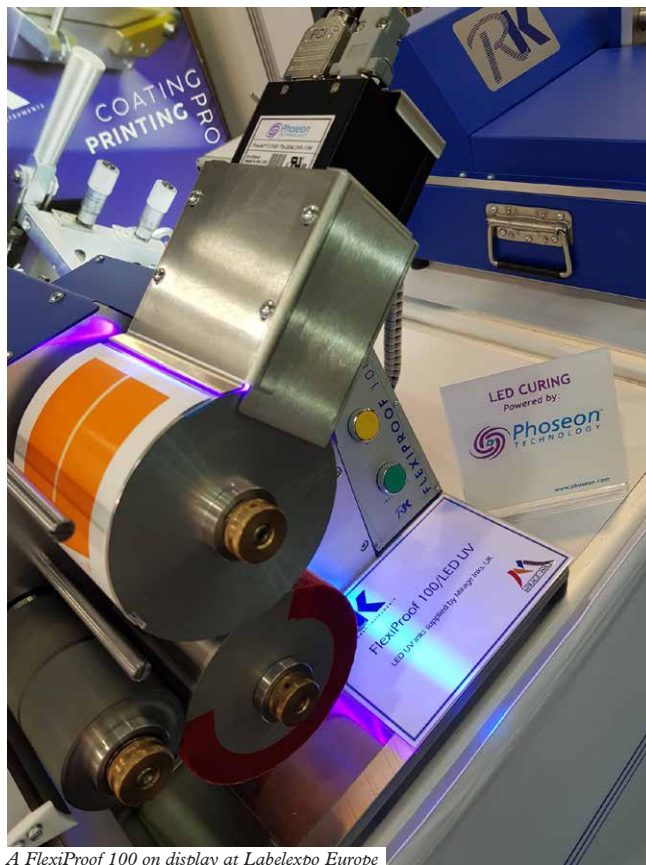
Food and beverage suppliers and manufacturers of consumer products are driven by current business conditions, which may be global in context and which often require an assertive and dynamic approach to every aspect of marketing – including presentation. Brands have to set up their pitch in the market that they serve and be strong and clever enough to survive and thrive in tough business conditions, including those bought about by once in a lifetime events (hopefully) such as the Covid pandemic.

Value

Brand owners and marketers expect their business partners to become fully engaged from the point of entry to the completion of the labeling and packaging project. Speed, efficiency and high quality are understandably important. Pre-press functions as a distinct process that lies between design and printing. It can add significant value to the overall print process. Pre-press systems and equipment can be used to determine process and product viability and address many of the operational concerns that may impact on profitability. Pre-press color communication devices have an important role to play in that these increasingly multi-tasking devices can be used to produce accurate proofs that printers can match at the earliest part of the production cycle.

Whether it's premium showcase labels for a skin care or cosmetic product, or a wraparound label for garden care – designers working in conjunction with marketing project managers are creating graphics that push the performance envelope of a flexographic press to its limits. For the converter, a good design is one that takes into account the strengths and weaknesses of the chosen print technology, the substrate, inks and any processes of a value-added nature that are to be included. As far as wish list requirements are concerned, pre-press and pressroom managers tend to be in agreement that although it may take many months for marketing, designers and boardroom decision makers to agree upon a strategy, pre-press departments and print shop personnel seldom have time on their side, moving swiftly through approved processes from artwork to proofs to plates to printing.

Working ever-aware that the clock is ticking, print and process standardization is a lofty ambition that many practitioners of label and package printing would aspire to if it were at all possible. It is hardly surprising that it is difficult – some say impossible – to standardize many of the print and converting processes. For one thing, label and package printing and converting are not like a good many manufacturing processes with conveyor flow line systems and where input parameters, once set, are not touched for long periods. Label printing and converting is different in that job changes, by comparison with most industrial processes, are



A FlexiProof 100 on display at Labelexpo Europe

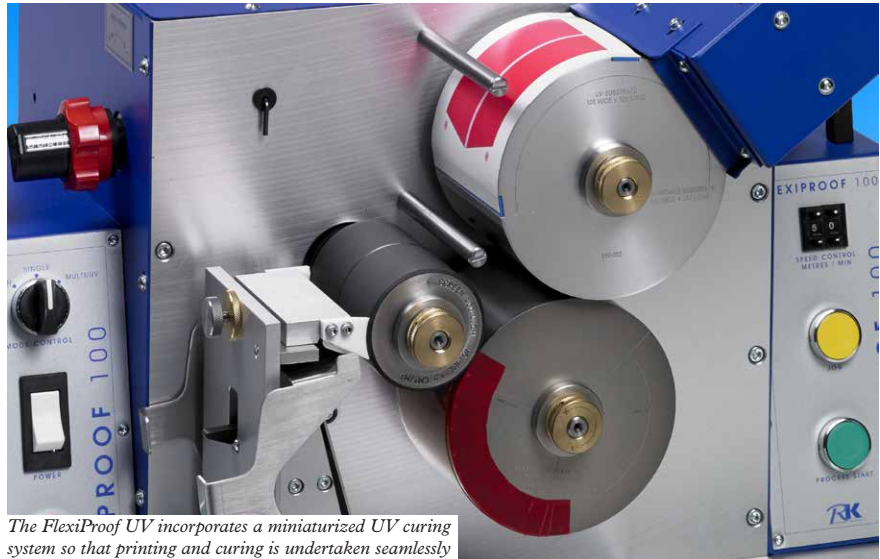
“For the converter, a good design is one that takes into account the strengths and weaknesses of the chosen print technology, the substrate, inks and any processes of a value-added nature that are to be included”



RK Print's proofing systems 100 can be used for trialing unfamiliar materials and consumables



Tom Kerchiss, managing director
of RK PrintCoat Instruments



The FlexiProof UV incorporates a miniaturized UV curing system so that printing and curing is undertaken seamlessly

“We each interpret color differently. Color is influenced by the health and age of the viewer, the light under which the sample is examined, our culture and our upbringing”

frequent, and so too are the materials used, the consumables, the inks and coatings. Design, layout, graphic components, ink and color requirements are all subject to change, and with job changes variables that influence and affect quality of output also change.

While designers, marketing personnel and focus groups may conduct brainstorming sessions to come up with innovative, colorful and highly functional label and product packaging design, it is the converter and various ink and substrate technologists that need to be one step ahead of the game: interpreting various ideas and agreeing to what is possible to produce and what isn't on a particular converter's current processing machines. Color communication devices, proofing or sample preparation equipment, such as those designed and developed by RK Print Coat Instruments, are able to undertake a variety of tasks, but their prime purpose is to generate proofs, which match the visual characteristics of the finished product as closely as possible. A proof can form part of the contractual agreement between printer and customer.

Color

Color can be a slippery customer. Color may agree with set numerical values but when it's being viewed and approved for a particular job it's not unknown for customers to raise color-related concerns. This is because we each interpret color differently. Color is influenced by the health and age of the viewer, the light under which

the sample is examined, our culture and our upbringing. Other issues that arise when color is being evaluated include geometric metamerism, a phenomenon exhibited by colors that appear to match at one angle of illumination and viewing but when the angle of illumination and viewing is changed colors no longer match. Geometric metamerism is normally associated with gloss and/or substrate textural surface issues.

Certain colors can produce unexpected results. When flexo printing on transparent filmic labelstock, the light scattering characteristics of an opaque white ink layer can greatly affect the appearance and finish of a product. Color may sometimes appear more intense than it should be. Often this may be down to one or two causes: too much ink being carried by the metering roll or doctor blade; alternatively, the problem may be due to ink being too concentrated during mixing. Adding an extender in controlled amounts will help to resolve this problem.

Consumers judge a product or brand by presentation, the printed face that it presents to the world. Color that just doesn't sit right is one thing; an absence of blemishes, pin holes or fisheyes is another. Obtaining color and consistency of presentation can be challenging at the best of times, but the different UV handling requirements, together with the need to control process variables in the shortest possible time, make it doubly so. Proofing a UV flexo-printed job is especially problematic in that obtaining an accurate

proof is difficult. Pin holes and many other blemishes simply cannot be captured – the reason being that during the time taken to run off a sample and then take it to a UV conveyor, the surface properties will have changed due to chemical reactions. The result is that the printer and customer have in their hands a run-off that does not reflect reality. Proofs are a snapshot in time and need to be judged on that basis.

Issues

The FlexiProof UV resolves many of the issues surrounding the use of, and the manufacture of, UV flexo inks. The FlexiProof UV incorporates a miniaturized UV curing system so that printing and curing is undertaken seamlessly. This highlights issues associated with inks and color representation, and it also enables users to pick up on pin holes and blemishes prior to making an unwelcome appearance at a later stage, on-press.

The FlexiProof UV and variants FlexiProof LED UV and FlexiProof 100 can be used for trialing unfamiliar materials and consumables; they can be used to determine printability and ensure consistency of performance of inks and substrates over time. They are used for computer and visual color matching, data presentation, educational purposes, and more. Printing and proofing off the production machine saves on waste, minimizes on-press adjustment of inks, minimizes production machine downtime and saves time, energy, labor and other costs.



Tom Kerchiss is managing director of RK PrintCoat Instruments, a Royston, UK-based manufacturer of proofing and testing equipment for a variety of industries. See www.rkprint.com for more information

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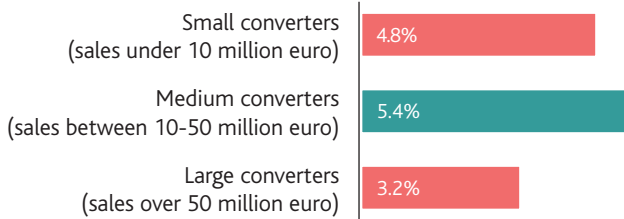
Advertisers index

| | | | | | |
|---------------------------|-----|---------------------------------------|-----|-------------------------------|-----|
| Arconvert Ritrama..... | 94 | Konica Minolta..... | IFC | Printum..... | 38 |
| Arjobex..... | 32 | Kraton Chemical..... | 143 | Re..... | 24 |
| Armor..... | IBC | Kruger Specialty Papers..... | 97 | RK PrintCoat Instruments..... | 133 |
| Avery Dennison..... | 101 | KTI - A Quantum Design Company..... | 116 | Rotometal..... | 15 |
| Berhalter..... | 111 | Kurz..... | 3 | RotoMetrics..... | 54 |
| Bobst..... | 139 | Label Academy..... | 45 | Ruco inks..... | 64 |
| BST..... | 107 | Label Academy..... | 140 | Schober..... | 112 |
| Buskro..... | 107 | Label Academy..... | 134 | Sicpa..... | 124 |
| Cartes..... | 78 | Labelexpo Americas..... | 30 | Sistrade..... | 27 |
| Cerm..... | 23 | Labelexpo Europe..... | 8 | SKC Films..... | 1 |
| Cosmo Films..... | 115 | LEMORAU..... | 115 | SPGPrints..... | 77 |
| Dantex..... | 112 | Lintec..... | 74 | Sun Chemical..... | 58 |
| Domino..... | 4 | Luster LightTech..... | 119 | Taghleef Industries..... | 13 |
| DOW..... | 36 | Mark Andy..... | 61 | Theurer.com..... | 116 |
| Durico C&T..... | 111 | Martin Automatic..... | 128 | Toyobo..... | 121 |
| Elkem Silicones..... | 103 | Meech..... | 107 | TSC Auto ID..... | 122 |
| Erhardt & Leimer..... | BC | Miyakoshi Europe..... | 64 | Univacco..... | 42 |
| Etirama..... | 108 | MoistTech Corp..... | 133 | Universal Engraving..... | 93 |
| Gallus..... | 2 | MPS..... | 28 | UPM Rafiatac..... | 49 |
| GEW..... | 33 | Nazdar..... | 81 | Uviterno Ag..... | 133 |
| Glunz & Jensen..... | 26 | Nilpeter..... | 86 | Vetaphone..... | 127 |
| Grafisk Maskinfabrik..... | 72 | OKI Europe..... | 133 | Wacker..... | 19 |
| Harper..... | 38 | OMET..... | 53 | Wausau Coated Products..... | 124 |
| Herma..... | 137 | Pantec..... | 104 | Yupo..... | 104 |
| Honle UV..... | 128 | Phoseon Technology..... | 91 | Yupo..... | 127 |
| Hybrid Software..... | 128 | Prati Srl..... | 88 | Zeller & Gmelin..... | 121 |
| Kocher + Beck..... | 51 | PREMIER COATING & CONVERTERS LTD..... | 122 | | |

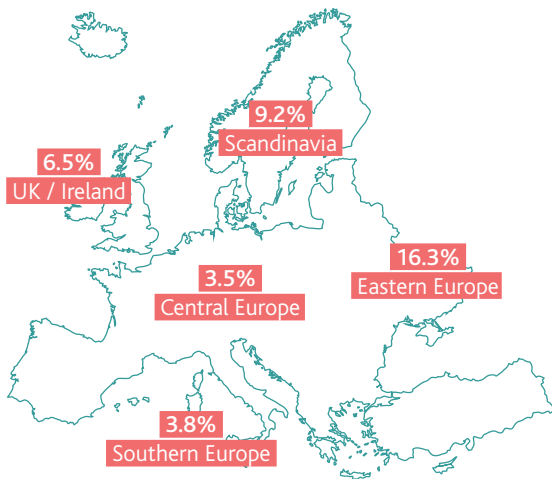
Label trends

The latest Finat Radar report breaks down converter survey results for 2020 and the beginning of 2021

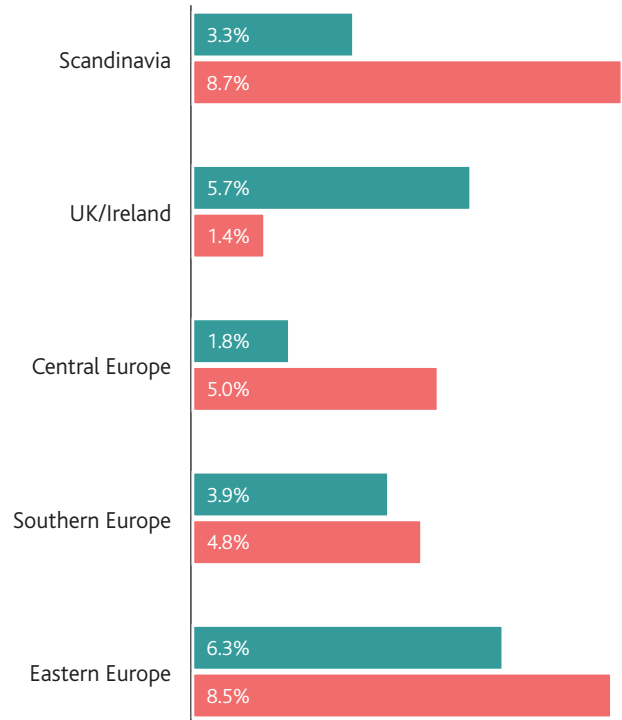
Converters' growth in 2020 by company size



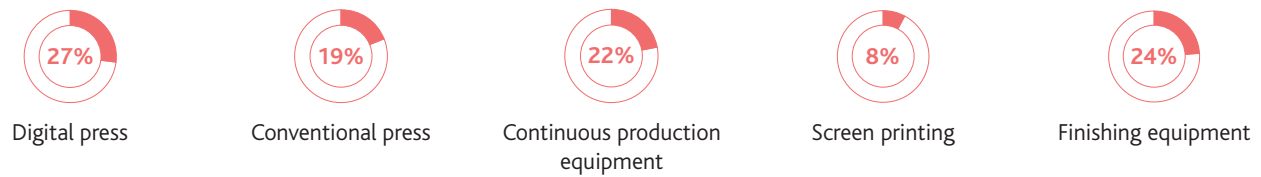
Converters' average sales growth by region in 2020



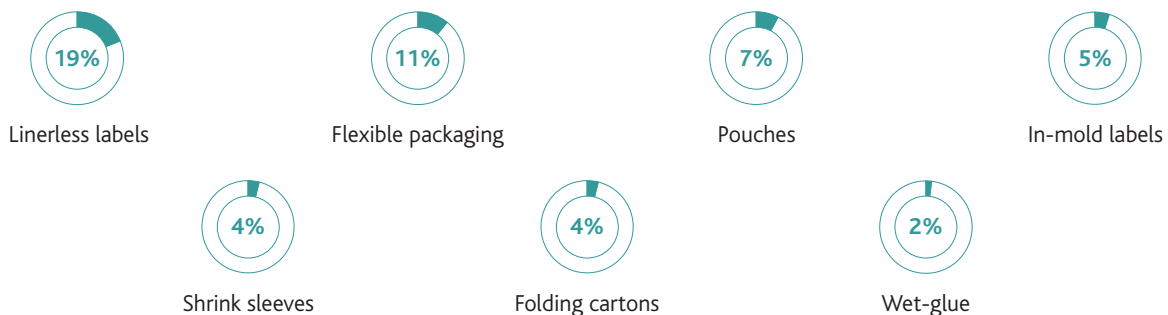
Converters' growth per region in Q1 of 2021 vs Q1 in 2020



Converter equipment purchasing projections for 2022



Markets converters are most interested in entering



Source: Finat Radar Report 15 – 1st semester 2021, report and analysis of the European narrow web market

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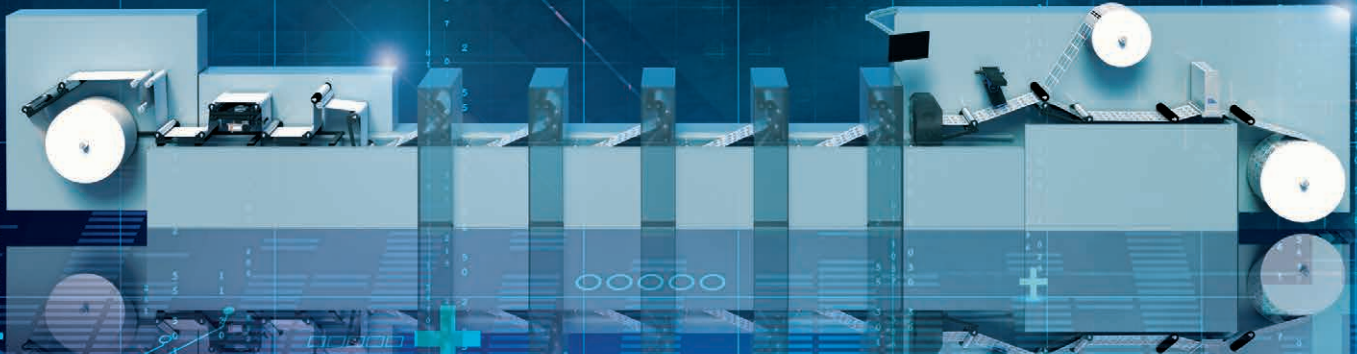
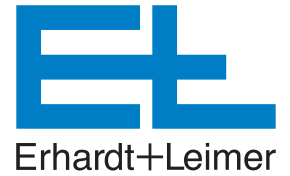
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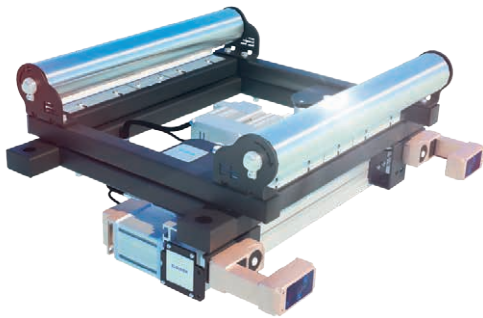


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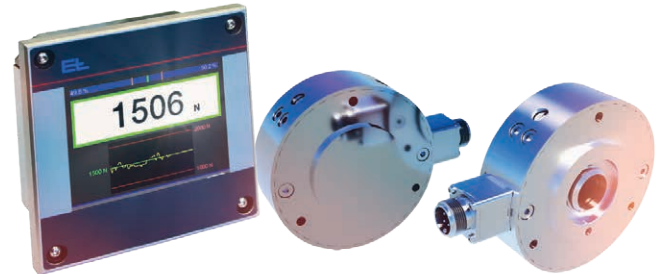
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