

PREDICTIONS 2024

Unveiling label industry forecast
for the year ahead

— EST 1978 —

LABELS & LABELING

THE WORLD OF PACKAGE PRINTING

LIGHTS-OUT PRODUCTION

Embracing an automated future at Mercian Labels

GLOBAL MARKET UPDATES

Trends and insights from around the world

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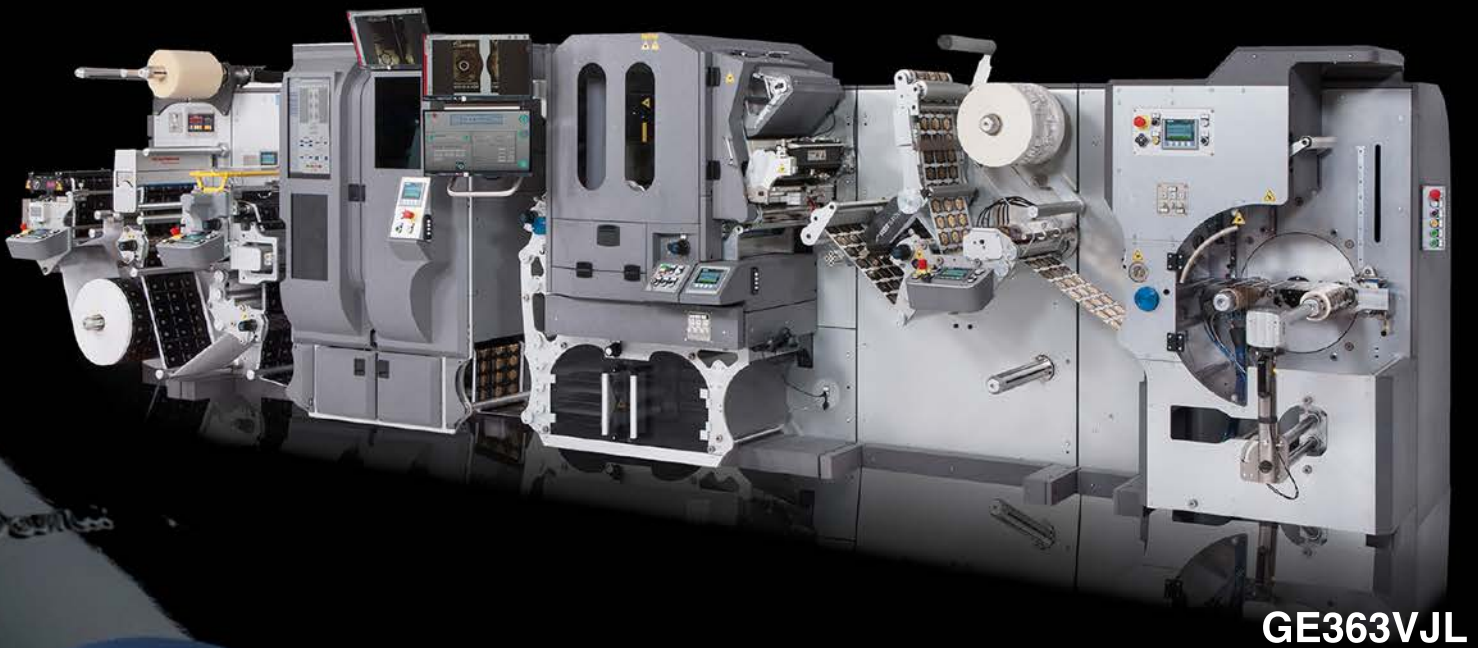
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AND TALK TO OUR EXPERTS**

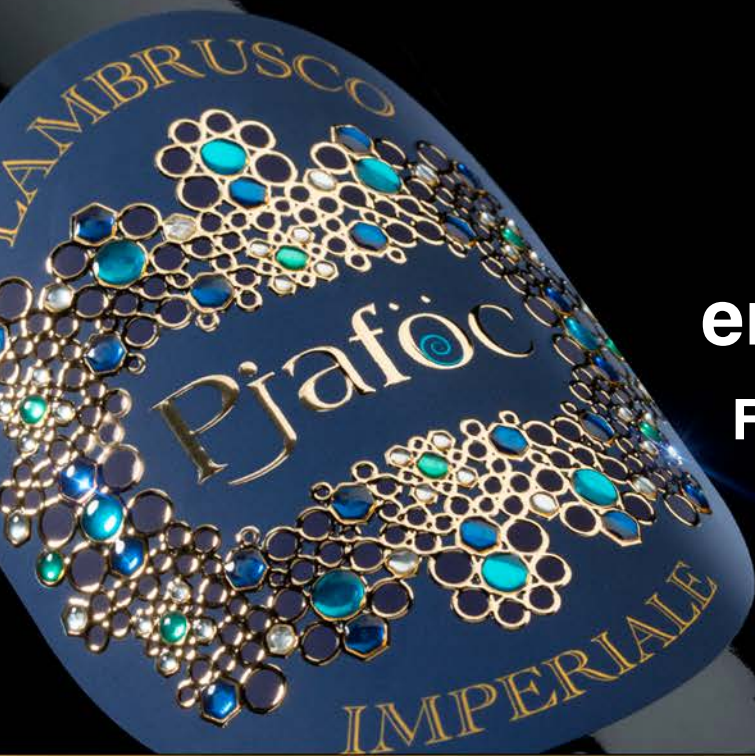




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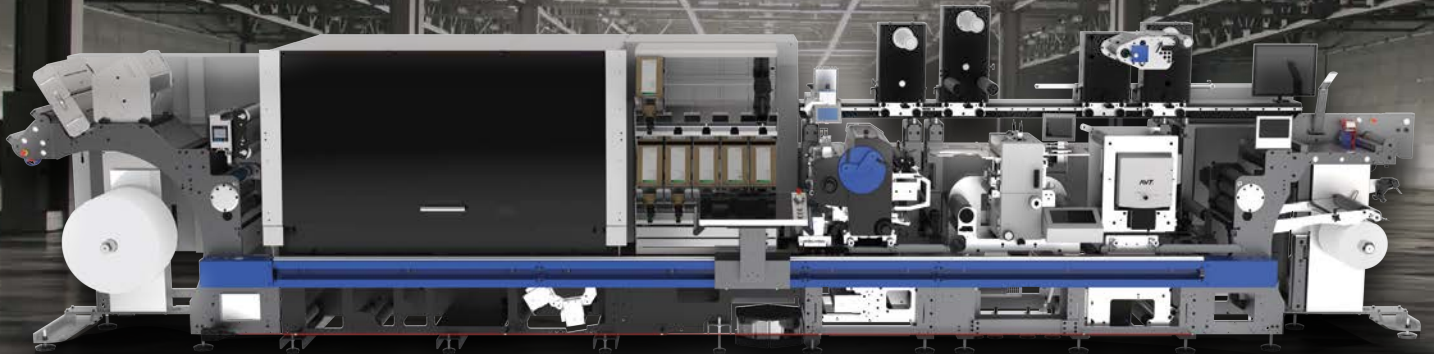
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L&L

— Meet the team

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



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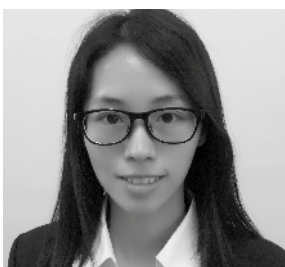
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Subscriptions

E: subs@labelsandlabeling.com
ISSN: 1478-7520

Printed by

CDT Associates Ltd, Sandhurst, United Kingdom

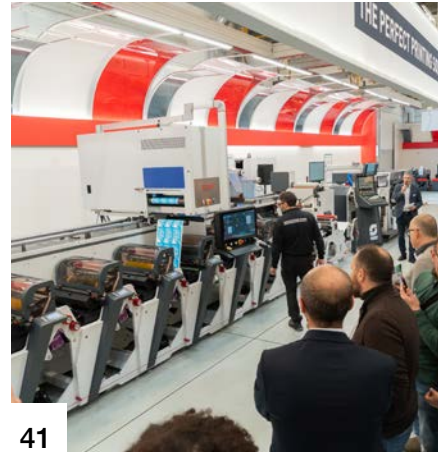
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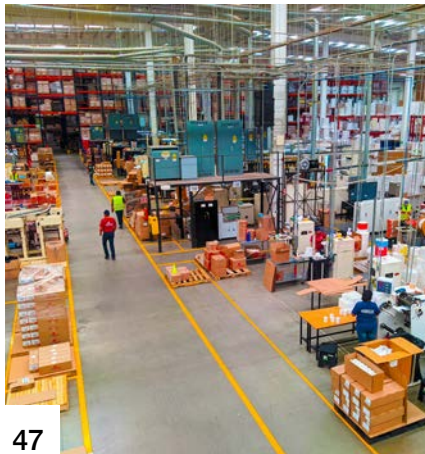
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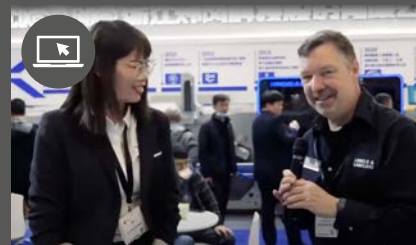
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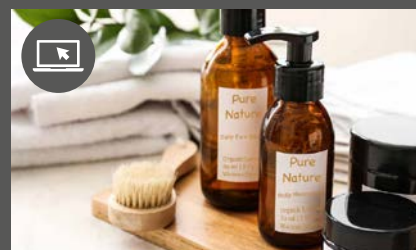
Labelexpo Asia 2023 – Weigang (video)

Andy Thomas-Emans speaks with Spring Xu, international sales manager of Weigang



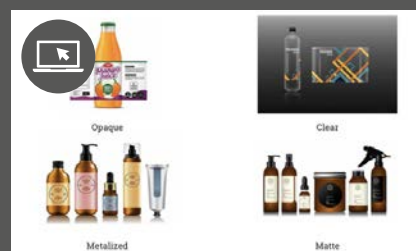
Read L&L Issue 4 online (magazine)

The previous issue of L&L is now available to read online



The bling factor (feature)

When it comes to health and beauty labels, embellishments are non-negotiable



Characteristics of PSA label materials (Label Academy)

Identification is an essential to fully understand the uses and applications

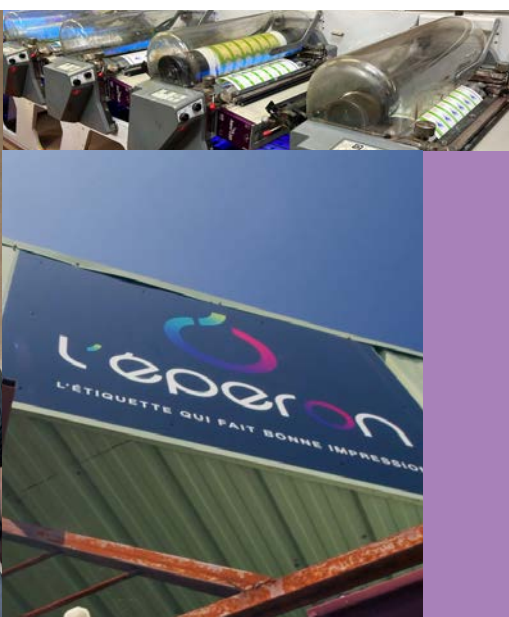
Eperon increases production speeds by up to 30%

Eperon's business revolves around flexographic printing and adhesive labels, a direction primarily influenced by the demands of the food industry.

The company has recently installed GEW AeroLED UV curing systems on two of their presses, helping them to reduce energy consumption by more than 50%.

Installing AeroLED has also introduced other benefits:

- A more stable and controlled UV curing process
- A significant reduction in lamp maintenance needs
- The ability to interchange between arc and LED UV curing technology, in under a minute



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full case study

gewuv.com/eperon



GEW
...engineering UV

L&L looks back (L&L issue 2, 2010)



Wet label

ANDY THOMAS looks at trends in wet glue label stocks with leading UK converter John Watson Printers and paper supplier Donald Murray Paper.



The future of packaging

JENNIFER JARRATT and JOHN MAHAFFIE look at a future where digitization will open opportunities for label converters. Nearly 15 years ago they predicted that smart pharmaceutical packages will be able to track medication efficacy.



HD Flexo drives quality at MCC

Multi-Color Corporation has used a 4000 DPI upgrade to its EskoArtworks Cyrel Digital Imager to implement high definition flexo printing. The result has been significant, as Dan Jerschfske reports.



Recipe for Success

CONSUMER MARKET RESEARCH, STRONG INVESTMENT AND A STRONG BUSINESS CULTURE IS Yerecic Label's recipe for success. Danielle Jerschfske reports.

P24 Andy Thomas looked at trends in wet glue label stocks with leading UK converter John Watson Printers and paper supplier Donald Murray Paper. The Glasgow branch of Donald Murray Paper supplied 30 uncoated papers from Zuber Rieder's stock system at the time.

P32 Jennifer Jarratt and John Mahaffie, leading market futurists, looked at a future where digitization will open opportunities for label converters. Nearly 15 years ago they predicted that smart pharmaceutical packages will be able to track medication efficacy.

P52 Danielle Jerschfske reported from Ohio about significant quality, workflow benefits and spectacular, new levels of high definition flexo printing achieved by Multi-Color Corporation after implementing a 4000 DPI upgrade to its EskoArtworks Cyrel Digital Imager.

P132 L&L reported on Yerecic Label's, which shared its recipe for success - consumer interaction, streamlined manufacturing, strategic investment, strong business culture and 'Do It right the First Time' message conveyed by the quality assurance department.



See our online archive at labelsandlabeling.com/magazine/archives

Embracing the technology of tomorrow

Editor's note

Welcome to the first Labels & Labeling issue of 2024, a year in which I believe we will see greater convergence between artificial intelligence and the label industry. I'm just back from the TLMI converter meeting and the Label Summit in Colombia, where AI was, without a doubt, on the minds of leading converters. And let me tell you dear reader, the future is now.

When we talk about AI these conversations are not just on hardware but how it's all integrated across the entire production chain, where data and data collection are key for driving forward innovation and optimizing production.

One converter I spoke to is trialling AI by inputting data sheets from material suppliers to a customer service algorithm that, in seconds, recommends substrates for different

"AI can help identify points of weakness in work practices and increase the overall efficiency of the converting operation"

application requirements. Another large converter has a team of 20 IT staff working on AI and implementing it wherever they can. Nearly everyone I spoke to was looking for ways to implement artificial intelligence in their production facilities.

The possibilities of artificial intelligence are limitless. The convergence of AI and label manufacturing is not just a technological advancement; it is a cultural shift that can redefine the way we approach production, sales, marketing, customer service and more.

In this issue, we have an excellent article about Mercian

Labels, a UK converter that took on a Herculean task to implement a fully automated non-stop digital label converting operation where the only manual intervention is to feed cores to the turret rewinder and change die plates. It took months to implement and change the culture, but the results are outstanding.

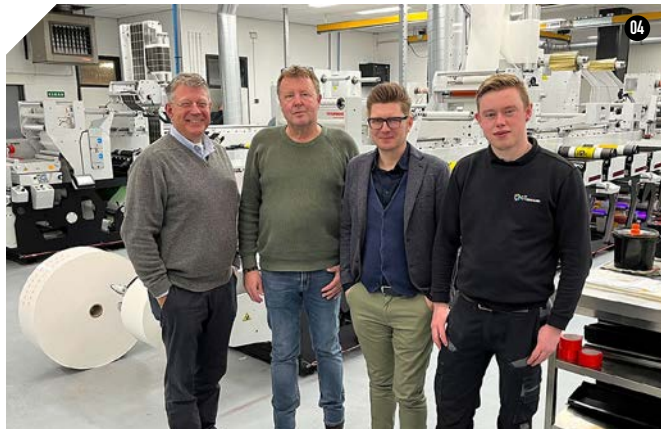
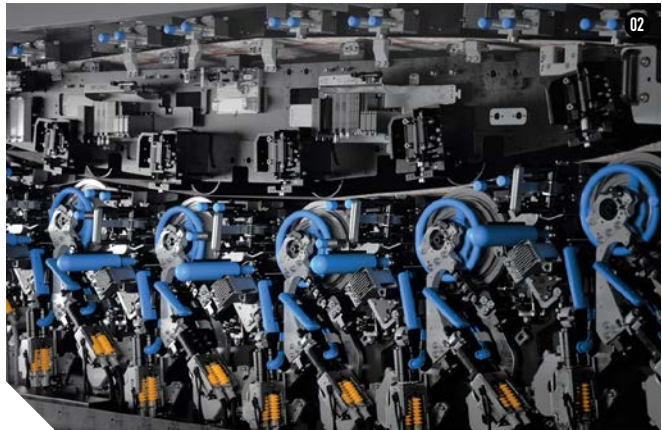
If not everyone has the fortitude of the Mercian team, there are small wins that can be implemented today. The more you look at it, the more applications of AI you can see benefiting the entire production value chain. From predictive maintenance, where an

AI-driven system can analyze equipment data to anticipate when machinery might require maintenance, or AI algorithms optimizing production by continuously analyzing variables, like printing speed, ink usage and material waste, through to AI-powered vision systems for quality control to inspect labels for defects and AI-powered chatbots to enhance customer service and sales.

AI can help identify points of weakness in work practices and increase the overall efficiency of the converting operation. And really, isn't that the goal of every label converter?

Chelsea McDougall
Group managing editor

Installations



01 Nilpeter FA-26
Catapult, United States
 Catapult Print, based in Orlando, Florida, has installed a new Nilpeter FA-26 press with 9 colors and a die station, the latest development in its mission to redefine print and disrupt the pressure-sensitive label market. The 26-inch press is the company's eighth FA-Line press from Nilpeter in the last five years but the first in 26in web width. The company has grown from a startup business in 2018 into one of the fastest organically growing label businesses in the US with a revenue of over 50 million USD.

02 HP Indigo V12 digital press
Brook + Whittle, United States
 Hamilton, Ohio-based Brook + Whittle has installed a new HP Indigo V12 digital press, expanding its production capacity to enable faster lead times and more agile supply. It reflects the company's conversion from its previous

conventional-first rationale into a digital-first mindset, utilizing 11 HP Indigo V12, 6K, 8K and 25K presses. This fleet allows the company to designate each job to the best fit HP Indigo press for lower total cost of ownership and optimized overall equipment efficiency. The V12 and 8K digital presses focus on mid and long runs, the 6K digital press takes the high versatility short runs, and the HP Indigo 25K digital press churns out the larger label and shrink sleeve jobs. With the new V12 press and its ability to process six colors at up to 400ft/min (120m/min), Brook + Whittle has boosted efficiency and enhanced its offering with unique digital technologies, such as variable data printing for any job size.

03 Durst Tau RSC E
Atlanta Label, United States
 Atlanta Label, based in Buford, Georgia, has invested in Durst Tau RSC E, which combines print

quality and productivity with highest uptime that results in a competitive TCO. The RSC E has maximum print speeds of 170ft/min (upgradeable to 262ft/min), 1,200 DPI native resolution and is available with up to eight color options plus highly opaque white. According to the company, since the installation, the quality has exponentially increased without missing lead times. Additionally, Atlanta Label CEO Lyn Thomas said the leadership team was impressed by the speed and 1,200 DPI print quality of the printer, as well as HP's customer service and price point.

04 Mark Andy Evolution Series E5 flexo
GT Etiketten & Labels, Netherlands
 Dutch label converter GT Etiketten & Labels has invested in two Mark Andy Evolution Series E5 flexo presses with GEW LED/UV capability and A B Graphic International (ABG) Vectra turret rewinders to

further expand its capacity. The company, based in Schoonebeek, opened in 2020 and installed its first Mark Andy press in 2022: an Evolution Series E3, 8-color flexo line with 17in (430mm) web width. Two more Mark Andy Evolution Series E5 presses followed in August 2023, both 8-color 17in web width. All three machines now have GEW LED/UV capability fitted with ABG Vectra turret rewinders. Additional features include Teknek web cleaning and Vetaphone corona treater, delam/relam, turn bars, cold foil, automatic and pre-register capability, die-cutting, a touchscreen interface for BST Powerscope vision system and a servo-driven cantilevered lower rewind with 40in (1016mm) capacity and taper tension.

05 Domino N610i 7-color digital UV inkjet label press
Art Advertising, United States
 Jonesboro, Arkansas-based Art

Installations



Advertising (AAi) has added the Domino N610i 7-color digital UV inkjet label press, its first digital narrow web machine. Domino had been on the company's shortlist for its ink durability, high-resolution print and wide-color gamut. The new Domino N610i was installed in December 2023. With this latest expansion into digital, the company, which also offers flexo roll labels and traditional offset printing, as well as larger outdoor signs, expects to see a significant reduction in the production time of certain label lines. Stacy Gestrung, AAi's president, said: 'We anticipate the Domino N610i will bring our roll label department a huge leap forward and open up markets we've previously not had access to because our existing flexo equipment was too slow, or we had a cost disadvantage because we would need to outsource larger or full-color roll label orders.'

06 Hontec 8-color flexo printing press

Innathan, Vietnam

Innathan, a label printer in Vietnam, has installed Hontec 8-color flexo printing press at its facility in Hanoi. This is the converter's second Hontec flexo press. The Hontec 8-color flexo press comes equipped with in-line die-cut options, providing the flexibility to choose between flatbed or rotary die-cutting. For short-run orders, the flat bed die-cutting option is ideal. In contrast, for longer or recurring orders, rotary die-cutting emerges as the more straightforward and cost-effective choice. While Innathan's initial investment in a 6-color flexo press from Hontec was primarily focused on IML labels, its expanded business horizon led to a strategic decision. The second flexo press, enhanced with a chilling drum, enables Innathan to print a diverse range of materials, including self-adhesive labels, wraps, shrink sleeves, BOPP, PE, PP, PVC, paper, tags and tickets.

07 Bobst Digital Master 340 all-in-one label press

M&R Label, United States

Chicago-based M&R Label has chosen the Bobst Digital Master 340 all-in-one label press to better meet customer demands for quick delivery and shorter print runs. With over 20 million labels shipped each week from the company's 22,000sqft (2,044sqm) facility, M&R searched for a highly automated machine that would optimize its production floor. The Digital Master 340 combines printing, embellishment and converting in a single pass, printing speeds of up to 328ft/min and is set to make a big impact as the company serves a broad spectrum of industries with custom product labels.

08 Fujifilm Jet Press FP790 Eco Flexibles, UK

Eco Flexibles, the UK-headquartered sustainable flexible packaging specialist, has installed the first Fujifilm Jet Press FP790 outside of Japan,

further solidifying the company's focus on sustainability by using water-based inks.

Unlike conventional digital presses that rely on toners and electrographic inks, the FP790's use of water-based inks ensures superior performance while further driving down carbon impact. Capable of printing on film, paper and production speeds of up to 246ft/min (75m/min) with no make ready and changeover downtime, it offers extended gamut printing with more than 90 percent of Pantone colors without more costly spot color inks. The Jet Press is located at the company's new state-of-the-art 40,000sqft (3,716sqm) factory in Northampton and signifies another leap forward in the company's commitment to innovation and quality.

09 GM DC330Mini label finisher

Label Lab, Jordan

Label Lab, based in Amman, Jordan, has installed a GM



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Installations



DC330Mini label finisher as a central part of its new label production setup. Despite its compact size, the machine delivers small and large batches of high-quality labels with tight registration available at all speeds. Moreover, it is user-friendly, making it easy to run even for operators with less experience. Since installation, the company of 11 staff has seen significant growth and intends to acquire additional GM equipment to expand into high-value luxury markets, with interest in the HF330 hot foil unit, the LC350 laser die-cutter and the DVM350 digital varnish module.

10 PureFlexo Printing plate technology

Köstlin Prepress Services, Germany
Köstlin Prepress Services, a packaging company in Ditzingen, Germany, has invested in PureFlexo printing plate technology from Miraclon to simplify production and achieve

consistent printing results. Accessed via Flexcel NX Print Suite for flexible packaging, PureFlexo printing utilizes advanced plate surface patterns designed to resist the tendency of ink to spread or build up in unwanted areas during printing. The technology allows for a more consistent production process and higher quality print, especially when printing on film. The company, which primarily focuses on food and cosmetics packaging for brand owners and retail private labels, has been using the Flexcel NX Ultra for solvent-free, VOC-free, water-based flexo platemaking for several years.

11 Focus Label FS 330 Series slitler/reviewer and die-cutter

Labels Fast, UK
UK-based converter Labels Fast has installed the latest FS 330 Series slitler/reviewer and die-cutter from Focus Label Machinery (Focus) as part of its ongoing modernization program

across a wide range of label production equipment. The new machine is configured as an inspection slitler/reviewer with a full rotary die station for converting blank labels and was installed alongside several existing Focus flexo and textile label presses. The Focus FS model is available with web widths of 9in (250mm), 13in (330mm) and 17in (430mm), and can be supplied with several different configurations, including twin die stations. The large capacity unwind has been specified to accommodate a full master roll, while scissor slitting, pneumatic crush slitting and razor slitting options are all available.

12 Vetaphone VE1A-C corona treater

Viet Spring, Vietnam
Vietnam-based label converter Viet Spring has invested in Vetaphone VE1A-C 410mm corona treater with six electrodes for its Etirama flexo

press to increase product quality and production efficiencies further. At its 11,000sqft (1,000sqm) production site in Ho Chi Minh City, the company operates a variety of rotary and semi-rotary presses, using both letterpress and flexo technologies in up to six colors. Viet Spring manufactures labels for the food and drinks market, as well as for the household goods, cookware, electrical, pharmaceutical and cosmetics sectors, along with laminate tubes, pop-up labels, peel/reseal and seals for screw caps. Substrates in daily use, including PE, PP and PET, need surface treatment to improve ink adherence, which led the company to Vetaphone corona technology.

For more installation news, visit labelsandlabeling.com/installations



Label & packaging showcase



Winners from the 46th annual TLMi Printing Excellence Awards

01 IsoPept Vanilla Ice Cream
First place, Best in show
Category: Wellness, pharmaceutical and nutraceutical
Produced by: McDowell Label, a Resource Label Group Company, Plano, Texas

02 Liebherr Remanufactured Component
First place
Category: Industrial – automotive
Produced by: Multi-Color Australia, Mile End, SA, Australia

03 Santo 2023 Mezquila
First place
Category: Wine and spirits
Produced by: AWT Labels & Packaging – Anaheim, California

04 Perdue
First place
Category: Innovation, single application, linerless and sustainability
Produced by: Hub Labels, Hagerstown, Maryland

05 Savage Bunny
First place
Category: Promotional and extended content
Produced by: Hub Labels, Hagerstown, Maryland



06 Stater Bros Pumpkin Puree
First place
Category: Food
Produced by: Inland Packaging, La Crosse, Wisconsin

07 Berkshire Lager
First place
Category: Beverages – alcoholic
Produced by: Inland Packaging, La Crosse, Wisconsin

08 Fireside - from Bath & Body Works
First place
Category: Household – under the counter
Produced by: Brook + Whittle, Guilford, Connecticut

09 Space Tea - from Vitamin Shoppe
First place
Category: Beverages – nonalcoholic
Produced by: McDowell Label, a Resource Label Group Company, Plano, Texas

10 Winter Breeze
First place
Category: Personal care and cosmetics
Produced by: McDowell Label, a Resource Label Group Company, Plano, Texas



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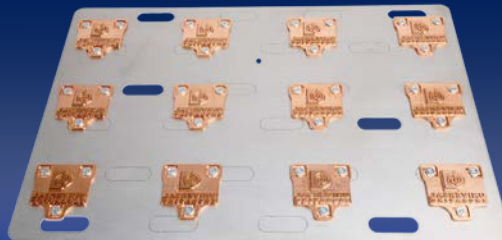
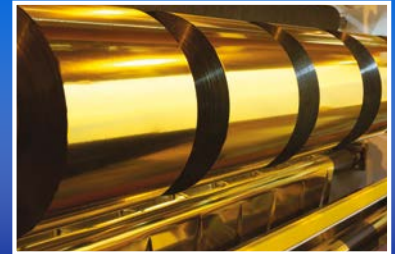
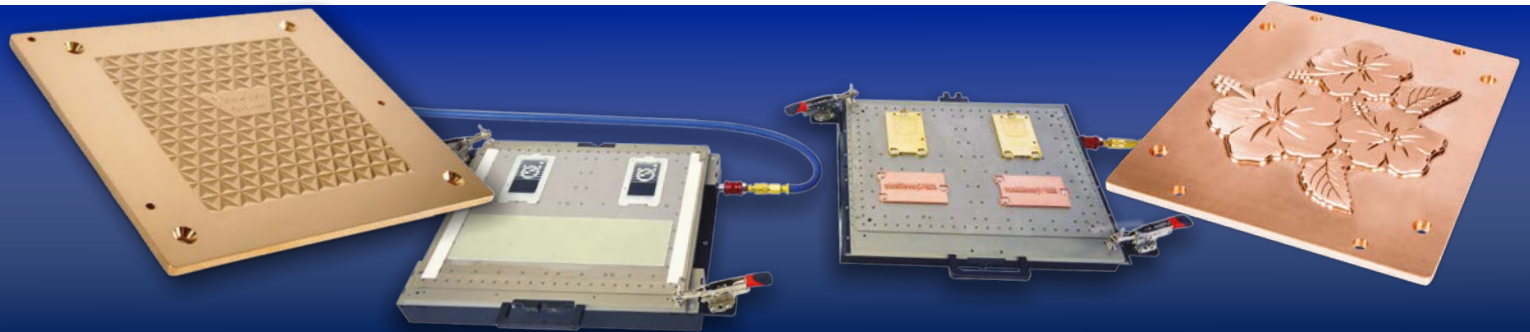
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The Andy Thomas-Emans column

China label technology goes global

Labelexpo Asia 2023 showcased a fully developed Chinese narrow and mid-web manufacturing industry with global ambitions, writes Andy Thomas-Emans

Labelexpo Asia 2023, held in Shanghai in December, demonstrated beyond all doubt that China's narrow and mid-web equipment, consumables and software industry has become a force to be reckoned with.

This was the show's 20th anniversary, and it is fascinating to see how far the domestic manufacturing industry and the Chinese label converting industry has come since then.

The first show in Shanghai marked the move of Labelexpo Asia from Singapore. It quickly became clear that this would be overwhelmingly a Greater China show (which is why Tarsus later launched Labelexpos in India and ASEAN).

At the time there was no 'labels' industry in China. Label converters were seen as part of the general print packaging industry segment. This was something Labelexpo had to build with its then-association partner PEAI, which mediated between the print industry and the government.

The first Labelexpo Asia show reflected this situation. Overwhelmingly, the exhibition was dominated by Japanese and Taiwanese letterpress machines, along with all the key Western press suppliers. The few Chinese suppliers present showed presses that appeared directly cloned from Western and Japanese machines.

The Chinese converting industry was very lopsided, with a tiny group of super-elite converters at the top of the tree who purchased top-of-the-range presses from the likes of Nilpeter (offset and flexo) to print labels for the global brands which were only just starting to move into China.

Technology today

Fast forward 20 years and the situation is transformed.

There is now an established label community that held its first Greater China Awards ceremony at Labelexpo Asia 2023 honoring both individuals and companies who had made significant contributions to the two-decade growth of the industry.

In addition, major global label converting groups including CCL Label, MCC and All4Labels have established a web of operations across China, further raising the overall technical level of the converting industry.

At this Labelexpo Asia, there were almost no letterpress machines. Chinese letterpress manufacturers have all moved to in-line flexography. Those companies usually manufactured intermittent offset presses as well, and this technology sector has thrived, in some cases challenging digital for short-run, high-value print and embellishment work.

High-end show floor

Although there were some entry-level presses at the show, most suppliers demonstrated impressively high levels of servo-controlled automation. And the servos, for the most part, were top-line German Rexroth/Bosch motor units.

The rapid transition to automated machinery has been driven by memories of the brutal lockdowns which exposed the limitations of gear-driven mechanical machinery. Equipment that required

"The Chinese market is far more sophisticated and the industry knows how to make use of more advanced Western machines"

high levels of skilled and unskilled manual intervention was fine when most converters were using cheap labor imported from the countryside, with workers often living in compounds on the production site.

But when these laborers returned to their villages during Covid-induced lockdowns, factory owners struggled to keep the machinery operating, and pressure grew on manufacturers to automate both machinery and production processes.

Another key trend toward shorter runs of value-added packaging has driven the development of digital press production. Chinese suppliers are using the same inkjet heads as Western manufacturers. Xaar, for example, launched a new partnership at the show.

There were both new UV inkjet digital presses and hybrid machines including a Weigang press demonstrating 8-color flexo printing, cold foiling, 7-color inkjet and digital embellishment in a single pass. Multiple high-build digital embellishment presses and laser die-cutting units were also on show. Running alongside this engineering effort is an impressive investment in AI and machine learning from companies like Luster Light, with the ambition of controlling process flow across entire print factories.

Notably, there were no conventional presses from Western suppliers at Labelexpo Asia 2023. Omet was perhaps the last company to show a machine at this show, building on its attempts to establish a Chinese manufacturing base. But most Western suppliers stopped showing presses a decade ago when they thought that to show a machine was to have it copied.

Today the Chinese market is far more sophisticated and the label converting industry is at a level where it knows how to make use of more advanced Western machines. And there is still prestige value in installing advanced Western presses – particularly for converters who service global brands in China. It will be interesting to see how Western suppliers react going forward.

As a final observation, it is notable that Chinese suppliers have global ambitions. In Europe, companies like Weigang and Wanje have set up local service, spare parts and demo hubs. And the winner of the first China Label Industry Technical Achievement award was Spande, which showed an advanced 26in-wide press at the show demonstrating hot-foiling onto shrink sleeves in a joint program with Pantec. Spande has booked the biggest stand at Labelexpo Europe 2025.



To read a full review of Labelexpo Asia, turn to page 64

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Sales motivation and sales enablement tips to drive growth



An effective sales team helps customers solve a problem or achieve a goal, rather than only selling a product or service, writes Lois Ritarossi, president of management consulting firm, Highrock Strategies

Owners of companies often ask me, 'We have the best equipment and workflow, why can't my sales team sell more?'

There are no easy answers to this question. Investing in an effective approach to motivate your sales team and create a company culture to support sales enablement can drive revenue growth.

B2B selling has changed forever. What will it take to motivate your sales team?

Selling labels and labeling technologies is not about the quality of the labels you print or even how fast you deliver them – it is about how your customer feels about your company and if they want your products and services again. It's about overall customer experience.

B2B selling today

In the last four years buyers of labels, print and other B2B services have adopted many new habits. Buyers are doing more research on their own before engaging a salesperson. On average, they are 60 percent through the buying process before salespeople even find out about a job or project. Buyers are more comfortable searching on their own for information. And they trust online information and reviews. Many buyers believe they don't need B2B salespeople to get information they can find through an internet search or AI chat.

Consensus buying is here to stay. Gartner research has tracked B2B buying trends for years. In 2019, the average number of decision makers involved in a B2B purchase was 5.4 stakeholders, in 2021 it increased to 6.8 stakeholders. And the average number of decision-making stakeholders swelled to 15 to 17 people in 2022.

With work from home and more online meetings, it's easy to invite more people to meetings. But that also means that it is incredibly difficult for a salesperson to identify all the decision makers and then

"Top sales performers understand that they must provide options that create a safety net for new customers making buying decisions"

map out a strategy for each individual preferences and their motivators driving the decision process. It's more difficult for salespeople to determine the primary decision criteria when there are many influences in the buying process. Consensus decision making means a team – not one person – is responsible for the outcome if things go wrong. Top sales performers understand that they must provide options that create a safety net for new customers making buying decisions.

Sales motivation is individual

Many believe that money is the universal sales motivator. Research shows that the motivation to sell is individual. In the 'Ultimate Sales Manager Playbook', Bill Zip explains four primary motivators for salespeople. Sales leaders must comprehend individual motivations listed below to successfully coach salespeople.

- Fortune – the ability to buy or own what they want whenever they want
- Fame – status, respect, recognition and acclaim
- Freedom – independence and flexibility to pursue hobbies, travel and pursue dreams
- Family – to provide for others, enjoy the lifestyle they desire

A culture of trust drives revenue

The task of sales leaders is to connect each salesperson's passion to the company's vision. Each salesperson must have clarity on the impact of their sales efforts to be fully motivated. Effective sales leaders are coaches. True coaching only occurs when there is mutual trust and respect. Sales

leaders need to earn the right to coach and lead individuals. Building a relationship, and demonstrating interest and compassion are building blocks. Having a personal connection based on trust must proceed with coaching.

These are not difficult concepts. As a consultant, I have seen much distrust between salespeople and their leadership teams. Trust lives and dies in conversations and actions. The good news, even when there are problems, is that trust can be repaired. The hard question is what will it take to build a relationship of mutual trust between sales leaders and the individual members of the sales team? Building trust is the foundational step to creating a plan for sales team motivation to maximize revenue.

Sales motivation is about your sales leadership and your sales team. Effective sales enablement is about how the entire company supports the sales process to produce more prospects, more sales and higher revenue. Look for my next article on sales enablement in the next issue of Labels & Labeling.



Lois Ritarossi is a certified management consultant, and president of High Rock Strategies, an independent management consulting firm focused on sales and marketing strategies,

and business growth for firms in the print, mail, communications and B2B sectors. You can read more about sales strategies at www.highrockstrategies.com. Email Lois at LRitarossi@highrockstrategies.com.

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The new dynamics of M&A

Label and packaging businesses must stay agile and be able to capitalize on a prime M&A opportunity when it comes along, writes Bob Cronin of The Open Approach

Labels and packaging have been a boon for M&A over the last decade. Fragmentation, local/regional competition, innovation, customer demand — and, of course, high margins — created opportunities not seen in other similar-sized industries. Private equity (PE), strategics and entrepreneurs all got in on the action, adding girth, territories, capacity and more that have afforded notable value creation and success.

M&A drivers have now changed. The abundance of transactions — both large and small — has created an entirely new landscape. Different factors are needed to compete, so different factors need to be considered for growth. To complicate matters, with the number of acquisitions completed in the US and European Union over the past 10 years, there are few remaining independent targets.

Entrepreneurs must understand these shifts and how they affect the way they run their businesses for the future. Every owner at some point either acquires and builds, or divests their company. And sometimes, you may need to act quickly. So, it's important to keep your organization up to date and in synch with current dynamics.

While not as fast-moving, labels and packaging M&A activity continues to be strong, as the industry remains attractive to investors. But the plays being made now and in the next few years will go beyond scale, geographies and end-market focus and be more about creating formidable and specialized entities.

The 'new label majors' will pursue acquisitions and divestitures by what they perceive are the next critical, high-profit opportunities. And we're already seeing this in play. New deals are being prepared with a greater focus on operations and market concentration.

Here's a little about what you should expect in these two areas:

Operations, finances and management

PE and strategic buyers are scrutinizing every deal to ensure that any acquisition has the resilience to navigate economic, regulatory and customer headwinds. Specifically, they're looking at:

- **Refinancing debt** — How might your leverage impact future profitability? What are the rates, terms and provisions of encumbered debt — and what can be equitably managed or refinanced?

- **Capital expenditures** — What is the state of your equipment assets and what is needed to fulfill the future vision?

- **Length and strength of leadership** — What are the tenure and skillsets of your top management team? Are the right individuals in place?

- **Overall market story** — Prospects become customers based on your story. How do you bring your message to market (direct sales, agents, distribution, internet, social media, etc), and what is the net cost to do so? More important, how valuable is your brand?

Market concentration and specialties

An acquisition must bring more than accretive revenues. Investors will favor enterprises that have unique capabilities, equipment or market expertise that differentiates you. These include:

- **Pharmaceutical/healthcare** — Healthcare (especially pharmaceutical) label spending has continued to grow, with increasing demand for pressure-sensitive labeling that allows traceability, fraud protection and brand recognition. Top

"The plays being made now will go beyond scale, geographies and end-market focus and be more about creating formidable and specialized entities"

acquisition candidates will be well-positioned in this venue, with both the regulatory savvy and equipment to respond.

- **Food and beverage** — Rising demand for consumer goods products and increased demand for product authenticity and uniqueness are driving demand for primary labels in the market. Both mainstream and private-labeled products are expected to see a surge in coming years, and those suppliers that can help them differentiate will win.

- **Sustainability** — Environmental friendliness is an enormously powerful movement that is driving significant new approaches in manufacturing. Investors will be looking at every acquisition in this regard, favoring those with a compelling sustainability proposition (e.g., linerless labels, carbon labeling/Carbon Trust certification, alternative energy use, recycling, etc).

- **Extended content, traceability, anti-counterfeiting, etc.** — Extended content, RFID, barcoding and other measures have finally come of age and will become increasingly important as we navigate new supply chain restrictions, regulations, consumer concerns and global expectations.

- **Digital technology** — Finally, and importantly, well-positioned labels and packaging companies will have both the digital capabilities and following to answer future demand. How does digital fit your customer base?

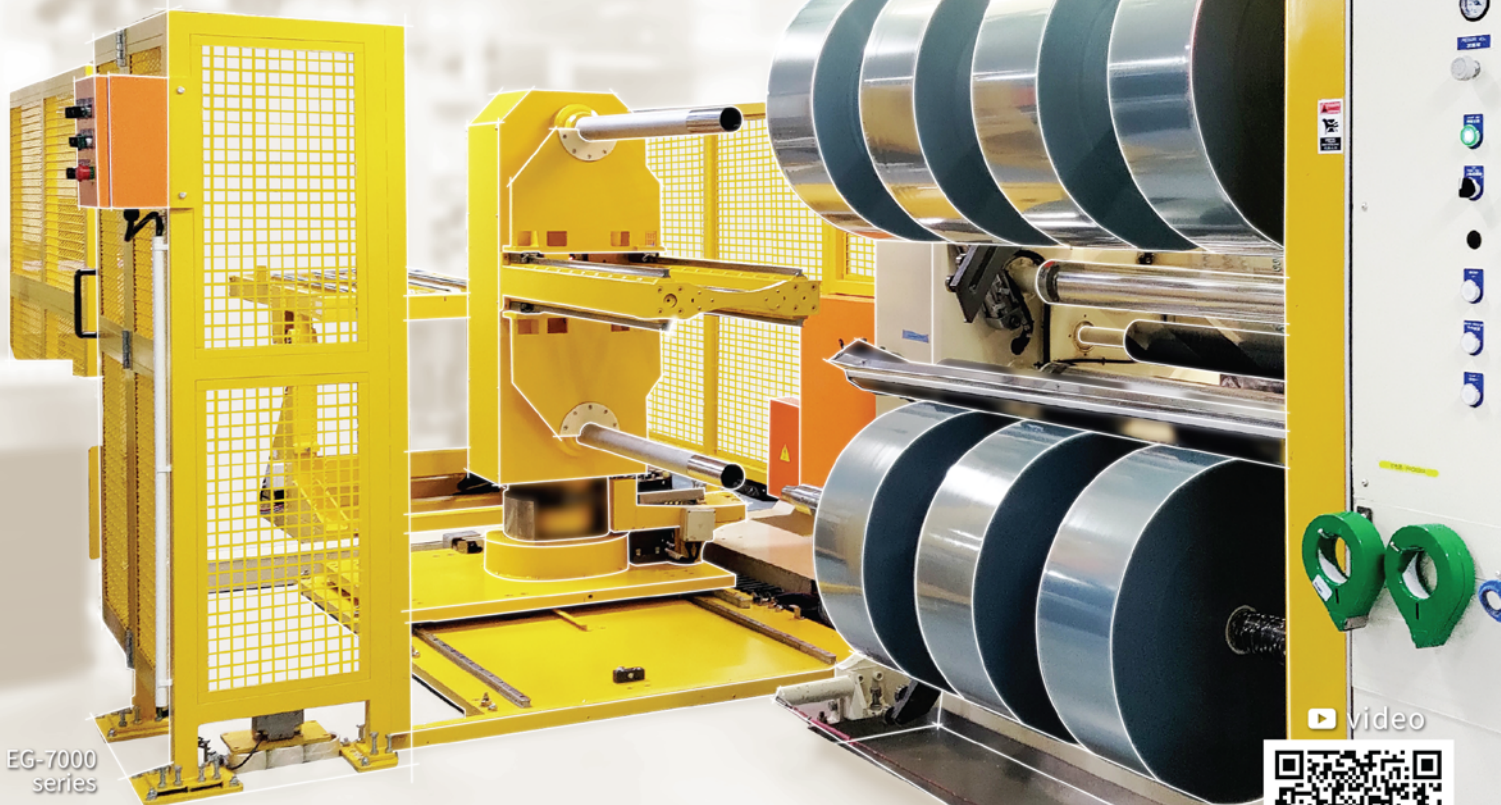
The labels and packaging industry is no longer driven by savvy entrepreneurs who took an idea and made it a business. It is now propelled by investors looking for a return better than they can get from other investments. This focus will bring about new consolidation strategies that leverage the aforementioned thinking and acumen.

Labels are mission-critical products that typically do well in both bad and good economic times. Even as we grow into a global marketplace, there will always be an opportunity for independent owners. But every great company still needs to map out a great future. Part of that is staying agile and being able to capitalize on a prime M&A opportunity when it comes along.



Bob Cronin is Managing Partner of The Open Approach, an M&A consultancy focused exclusively on the world of print. In addition to spearheading several large Labels & Packaging industry transactions, the firm handles value-enhancement, due diligence, industry trend analyses, and exit planning. It is one of the most tenured agencies in this space. To learn more about The Open Approach, visit www.theopenapproach.net, email Bob Cronin at bobcronin@aol.com, or call or text 630-542-1758.

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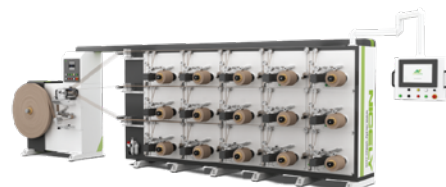
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Exploring the steps to environmental management

Third-party certifications assure stakeholders and provide a framework for managing environmental responsibility, Rosalyn Bandy writes

Third-party certification, where an independent auditor reviews a company's practices against the requirements of a standard, is a powerful way to show your customers, suppliers and other stakeholders that you're serious about your efforts and that you meet, or go above and beyond, environmental regulatory requirements.

In terms of sustainability in the label and printing industry, two of the most recognized are ISO 14001 and the Sustainable Green Printing Partnership (SGP).

As brands, investors and the public increasingly expect companies to behave in an environmentally responsible manner, operating with an environmental management system in place signals that you are committed to responsible practices, thereby leading to a better reputation with your customers. This is on top of the clear operation efficiency gains, risk management and regulatory compliance.

In this column, I will explore the steps to take to implement an environmental management system in your facilities.

ISO 14001

Let's look at ISO 14001, the internationally recognized standard for environmental management systems (EMS).

All management systems follow a continuous improvement model of Plan, Do, Check, Act on an annual basis to establish policies, goals and processes to meet certain objectives. For ISO 14001, it looks something like this:

Plan: establish environmental objectives and processes necessary to deliver results in accordance with the company's environmental policy.

Do: implement the process as planned.

Check: monitor and measure against the environmental policy, including commitments, objectives and operating criteria, and report the results.

Act: take actions to continually improve.

ISO has many management systems, including environment, quality, and health and safety. A strong benefit of using ISO 14001 as your EMS is that if you are currently using another ISO standard, such as quality, you are already familiar with the ISO structure and can use the same core management system functions for all

"Third-party certifications provide an invaluable system of assurance to stakeholders"

your ISO programs. In addition, ISO is not written for any one type of organization or industry; it's generic, and thus requires each facility to build the scope and content of its EMS from scratch. It is common for companies to enlist the help of ISO 14001 consultants to assist in navigating the requirements.

ISO 14001 requirements for content include the following categories:

- Context of the organization
- Leadership
- Planning
- Support
- Operation
- Performance evaluation
- Improvement

Auditor Wendy Nadan, who has presented at TLMI functions numerous times, recommends the following steps for companies:

1. Have senior management declare certification as a clear goal.
2. Incorporate the EMS into every area of the business – sales, purchasing, shipping, logistics and manufacturing.
3. Integrate and include elements into everyday operations.
4. Utilize already existing methods, policies and procedures like your mission statement and sustainability policy.
5. Give authority and responsibility where necessary, adding new policies and procedures to your operations.
6. Employee training and active participation is key.

Sustainable Green Printing Partnership

Like the ISO 14001 standards, the Sustainable Green Printing Partnership (SGP) offers certifications on printing facilities in the US and Canada through its sustainability management system (SMS) approach.

An SMS is a management approach that aims to integrate sustainable practices into all processes and internal steps of a company. Like an EMS, it uses the Plan, Do, Check, Act annual cycle. SGP certification is industry-specific; certification criteria are written for the narrow audience of the printing industry. SGP follows the

sustainability pillars of people, planet and profit.

To be certified by SGP, facilities are required to develop and implement the following:

- A sustainability policy to document and communicate the company's commitment.
- Communication with internal and external stakeholders.
- A sustainability committee to monitor the SMS.
- An annual internal review of the entire program.
- Measurement and monitoring of key metrics.
- Upper management annual review of the entire program.

A key difference between SGP and ISO 14001 is that SGP provides templates for all the required written procedures, audits and assessments. SGP also provides access to the SGP Impact Tracker, an online tool that makes document control convenient and enables year-on-year performance tracking.

With SGP, environmental, health and safety audits, and an energy audit (including emissions) occur every two years. Each year, companies adopt a continuous improvement project with measurable results and there must be a set of clearly defined best practices of the company's choosing.

While I have been a director on the board of SGP, either certification is important to have. Third-party certifications, independent of a company or product, provide an invaluable system of assurance to stakeholders. End users and the supply chain can be assured that the company can be relied upon and trusted.



Rosalyn Bandy is VP of sustainability for TLMI.

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For information about TLMI membership, please contact engagement director at dale.coates@tlmi.com



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INDUSTRY LEADERS SHARE PREDICTIONS FOR 2024



What's in store for the year ahead? Leading industry experts from across the globe look at the key challenges and talking points likely to dominate the label and package printing industry in 2024. Article compiled by Pitor Wnuk

All4Labels Global Packaging Group, Paola Iannone, vice president of marketing and communications

If we had to identify three key packaging features for 2024, they would be sustainability, connectivity and personalization with digital printing.

The new year will see many new sustainable labels and packaging solutions, exploiting the latest technologies. Trends will include reused, recycled and recyclable materials, with improved access to recycling streams and operations focused on renewable energy, for lower CO2 emissions and less production waste.

Meeting end-users' sustainability needs also demands constant rethinking under a more inclusive spotlight, opening the path to new levels of diversity and social responsibility, with packaging fully aligned with customers' values.

Connectivity using QR or RFID tags adds features and functionalities that enhance product compliance. It also provides access to online information and manuals. Brands can leverage interaction opportunities – even with voice messages and augmented reality experiences – for increased consumer engagement and brand loyalty. Intelligent solutions also provide brand protection, confirming authenticity, supporting tracking and protecting against counterfeiting.

Variable data management and effective use of AI will enable unique tailor-made solutions, with optimized packaging using appropriate sizes, layouts, and forms - cutting material use, transport needs, and even costs.

Aldus Graphics, Ken Sky, general manager of Tronics Australia and New Zealand

In the dynamic landscape of manufacturing, the adage that millionaires are made in recessions holds true for those who invest wisely. This proposition is illustrated by the recent surge in manufacturing plants upgrading their technology amidst economic uncertainty. Over the past year, these forward-thinking plants have transformed their operational systems, making them smarter, faster and more profitable.

The cornerstone of this revolution lies in Industry 4.0, underpinned by interconnected devices, artificial intelligence, big data analytics, and advanced robotics. These four pillars synergize to usher in a new era of efficiency, quality control, data robustness, waste reduction, and overall operational excellence.

Avery Dennison, Jeroen Diderich, senior vice president and general manager for materials group, North America

As we enter 2024, the economic landscape remains dynamic, showing signs of recovery in the back half of the year. While technology and innovation offer avenues for growth, challenges such as inflation, geopolitical tensions, and shifting labor market dynamics demand careful navigation. We remain optimistic for a stronger 2024 and are using the coming year to focus on three main priorities- improving the customer experience, advancing sustainability practices and helping implement RFID technology.

We expect 2024 to witness a continued shift towards sustainability as businesses increasingly prioritize environmental, social and governance (ESG) practices. In the US, we continue to see more regulations being introduced along with retailers and brands looking to measure and improve their carbon footprint. It will be increasingly important for the industry to utilize tools to measure carbon footprint and work together to develop a path to net zero.

Bobst, Patrick Graber, marketing director for narrow and mid web

To maintain competitiveness, printers must optimize their production floor and use resources effectively. Strategic future-proof investments in all-in-one production lines and flexo

presses with higher levels of digitalization and automation, like the Bobst Digital Master platform and Master M6 press line, are key to improving efficiencies, delivering high quality, and meeting ever shorter deadlines. Proven waste reduction initiatives within production processes and eco-friendly labels will be more important than ever to support brand owners' sustainability goals and comply with legislation.

In-line flexo with oneECG technology for extended color gamut printing is emerging as the favorite choice for short-run flexible packaging, clearly dominating over digital alternatives in terms of cost-effectiveness and productivity. Meanwhile, UV inkjet, known for its high quality and exceptional speed, will continue its upward trajectory as adoption grows and new applications are addressed. Finally, printers embracing fully connected workflows will reap the benefits of end-to-end process control, a critical trend in label and packaging production.

Cartes, Virgilio Micale, global sales manager

All markets have suffered various imbalances and unfortunately, situations continue to arise at a global level that do not provide a feeling of stability or confidence for investments. Additionally, the labor market has been affected by a substantial lack of human resources, which today represents the main problem for many companies.

For Cartes, business foresight is crucial and although we know it does not guarantee success, it prepares us to face the needs of our clients. We are obliged to believe in the future and continue concentrating energies on ensuring that automation increasingly becomes an integral part of all processes, so users can immediately optimize profit margins that have weakened in recent years.

Cosmo First Limited, Pankaj Poddar, group CEO

Focusing on innovation in manufacturing is crucial, not only for creating new products and enhancing design but also for global competitiveness. Sustainability is emerging as another pivotal factor, providing a competitive advantage for those prioritizing eco-friendly practices. We anticipate tough market dynamics, with sustained pressure on the entire supply chain — from manufacturer to printer to brand.

The Indian market is characterized by its substantial youth population, and we see a food packaging sector that is poised for growth. With India's robust manufacturing infrastructure, there's potential for increased exports and the production of niche, value-added products.

DG Press, Adelbert Schoonman, senior engineer for innovation and development

For 2024 and beyond we observe several trends that will have an impact on the label, packaging, and security printing industry. Particularly aspects like process sustainability, reduction of carbon footprint, and recyclability of printed products demand changes in materials and production equipment.

In the flexible packaging market, the demand for enhanced recyclability of single-use packaging requires combinations of mono-material films with newly developed functional barrier coatings, enabling the production of recyclable packaging with functional and performing barrier properties. De-inking will become more important, as completely clean recyclates have higher value and facilitate true circular recycling.

Energy curing of inks, like EB, UV and LED-UV, will take a larger market share, due to energy efficiency and lower carbon footprint in comparison to solvent and water-based inks.

Another trend is that security features will become more important in flexible packaging and labels. Although the main reasons for security features – preventing falsification and

counterfeiting – are still valid, recognition of packaging in scanning processes and recycling streams has become as important.

Domino Printing Sciences, Peter van Riel, European commercial director for digital printing

Despite supply chain disruptions, digital label printing has been growing steadily over the past five years. In 2024, we expect to see further growth, though at a slower rate, as converters facing labor, sustainability and regulatory challenges are looking for innovative solutions to increase production capacity and efficiency.

Consumer interest in accessing traceability and sustainability information via connected packaging is also growing, and over the next year, we expect to see more brands adding unique QR codes to their labels as a way of gaining consumer insights and fostering brand loyalty. The capability to add variable QR codes, as provided by digital printing technology, will be key for converters.

Retrofittable hybrid digital technology will play its part in responding to this trend. Adding digital modules to existing flexographic processes will allow converters to help brands meet traceability requirements through variable data while delivering cost and waste savings compared to investing in a new hybrid press.

On the supplier side, equipment manufacturers and consumable suppliers will shift their focus to building strong long-term partnerships with converters, supporting continuous process improvement and optimization with innovative technologies and advanced services.

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

As we look forward to 2024, we find ourselves grappling with the aftereffects of a disrupted supply chain, evolving consumer preferences, and growing demands for sustainability.

The packaging and labels industry is constantly evolving, driven by advancements in technology, changing consumer preferences, and sustainability demands. Businesses must not only adjust to this transformed landscape but also position themselves to excel within it. Packaging and label experts must recognize the potential for enhancing sustainability, fully harnessing the latest technological advancements, optimizing supply chain processes, and achieving greater operational efficiency.

With continuing margin compressions and supply chain factors through to environmental sustainability targets, skills shortages and managing the ongoing energy crisis, the industry must undoubtedly transition towards more efficient, resilient and sustainable practices to successfully navigate the likely challenges it faces throughout 2024.

By leveraging technological advancements, optimizing supply chain processes, and enhancing operational efficiency, packaging experts can position themselves to excel in the coming year and beyond.

Fedrigoni Self Adhesives, Melissa Harton, marketing director for North America

After a period of significant volatility within the overall supply chain, we expect to see the industry begin to recover and see markets stabilize across verticals, continuing a trend we began to see in late 2023.

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Efficient inventory management will be one key factor in this recovery.

Driven partly by the pandemic's impact, we continue to see a shift toward SKU consolidation with converters. We anticipate this trend to continue across the industry. Not only does SKU reduction accommodate evolving consumer needs, but it also allows converters to optimize inventory levels, reducing excess stock and operational costs.

Fedrigoni predicts a sustained focus on unique shelf differentiation, with an emphasis on high-quality, premium products to capture consumer attention and loyalty.

Sustainability will remain a top priority industry-wide. End users will require converters to find eco-friendly alternatives, including thinner gauge materials, recycled content materials, and explore various environmentally conscious options like APR, FSC, and compostable materials. Corporate Environmental, Social, and Governance (ESG) goals will play a significant role in shaping suppliers' strategies, aligning with customer and end-user expectations for greener manufacturing methods and materials that promote recycling, reusability and minimize environmental impact.

Flexcon, Dan Riendeau, strategic business unit manager for packaging, Flexcon North America

Sustainability is not going away, so it will continue to be a focus. Down-gauged films are gaining popularity with printers asking for thinner versions of BOPP and PE films. These are easy transitions to make and can have an immediate impact. We have been seeing a slight lift in film demand across the packaging market for applications that were historically paper due to paper

supply chain challenges. However, the misperception that paper labels are more sustainable continues when, in fact, they are detrimental to the recyclability of PET and HDPE containers because they contaminate the recycling stream.

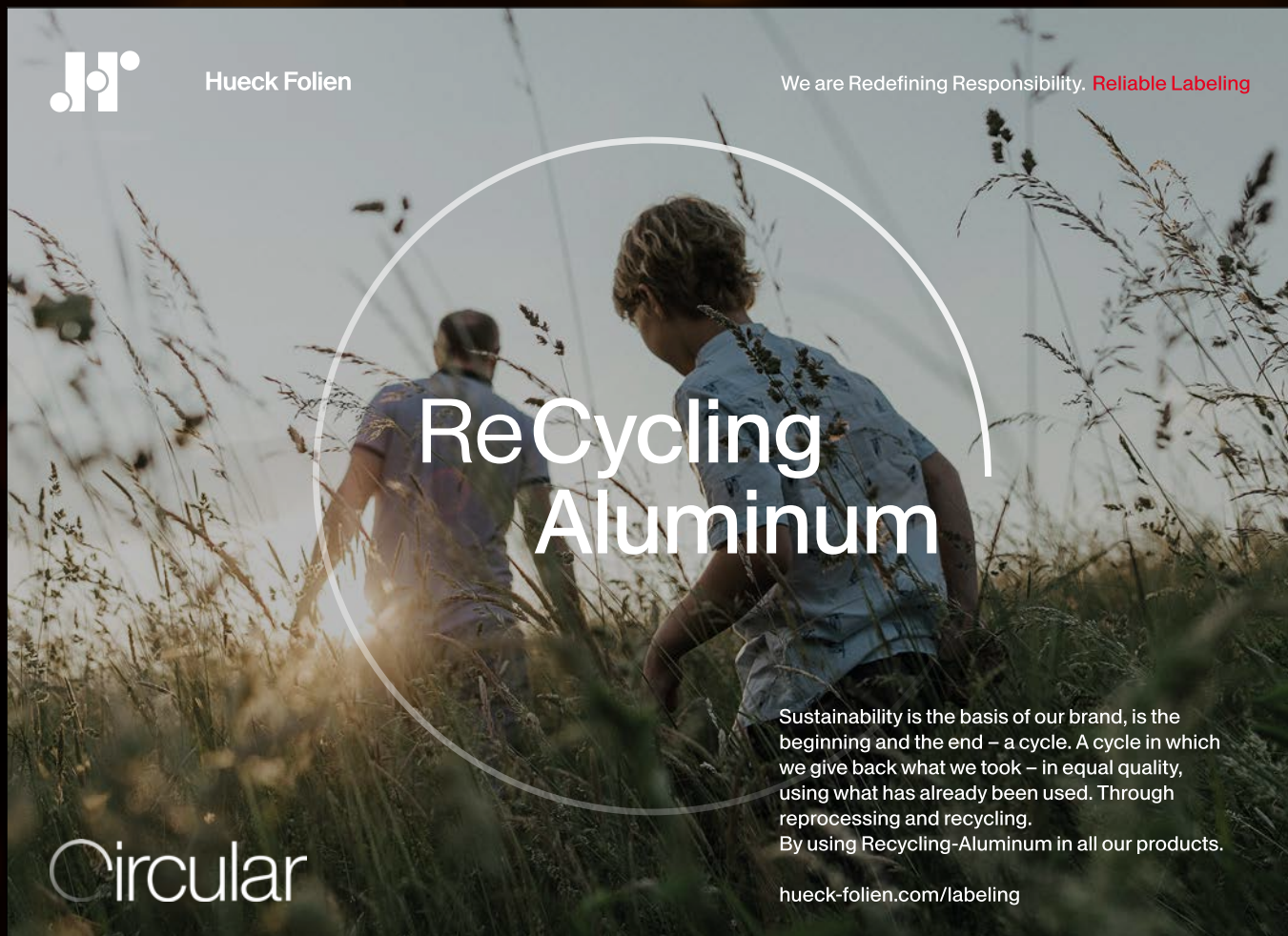
In addition, the (possibly mandatory) use of recycled content in films and/or liners is expected to become mainstream, and the industry must focus on a stable supply stream for these solutions. The use of bio-based polymers will gain more attention for both films and adhesives, although it is too early to understand when this will scale up in our industry. Finally, life-cycle analysis will become more common because end-users want to fully understand and assess the impact of each component used in a packaging solution.

Flint Group, Anna Niewiadomska, marketing manager for narrow web

The foremost priorities expected within the label sector in 2024 are maintaining costs and print quality while focusing on sustainability and simplification, as witnessed across the print industry.

2024 will see further pressure on brands and printers as legislation continues to become more stringent worldwide. Potential legislation changes mean that partners like Flint Group must offer new ink innovations, especially for higher demand for Food Contact Material (FCM) applications. As automation and digitization become more commonplace, the need for high-quality and consistent inks will also increase.

Increased complexity of printing will also put more pressure on label converters, further driving the adoption of new ink technologies. Partners like Flint Group must consistently provide



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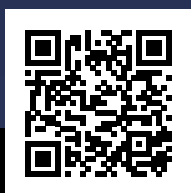
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knowledgeable and responsive technical support. This support will become even more crucial as the skilled workforce shortage continues to impact operations throughout the label industry, particularly in Europe and North America. Automation and connectivity will stay atop the priority list.

Focus Label Machinery, David Lee, technical sales director

In an uncertain world, global economic and political pressures will continue to affect business investment plans through 2024.

One driver is clearly customer demand, as research continues to show that consumers increasingly prefer companies with a solid commitment to reducing their environmental footprint. As the green economy grows, we're learning that green solutions often lead to bottom-line growth. This will lead to companies of all sizes offering customized solutions to build stronger relationships with customers.

On the back of this, the digital revolution is gathering pace with high-end toner and inkjet solutions improving production speeds and making them a more attractive proposition. The trend is moving to more automation and hybrid technology integrating flexo and digital converting technologies for a single-pass solution. Energy will continue to focus attention on the costs of running inefficient drying systems on old equipment, with LED drying reducing energy costs and increasing uptime it would seem a win-win for any business looking at new equipment or upgrading existing machinery.

GEW, Robert Rae, managing director of sales

Sales of new machinery have been hard hit in 2023, as high interest rates, consolidation, weakening economies and global conflicts have combined to negative effect. We hope and expect that interest rates will reduce next year, encouraging more machine investment in Europe and the USA, which has been weak for the past two years.

Our retrofits have been strong, especially in Europe and in UV LED, driven by the productivity improvements and energy savings that LED brings. We expect this to continue growing in 2024, despite reductions in global energy prices, because these remain well above pre-pandemic levels and the technology continues to improve with products such as GEW's AeroLED. More label printers are switching their production sites fully to UV LED, accelerated by the preparedness for LED that GEW's Rhino technology introduced in 2015. We are now seeing many companies make the most of their LED-ready investment from all those years ago.

There has been a marked increase in the prevalence of hybrid inkjet and flexo machines in the last couple of years, which seems destined to increase further as huge investments are made in improving these technology platforms.

HP, Haim Levit, senior vice president and general manager for HP Industrial Print

Labels and packaging, while being a resilient and stable industry, has been navigating a period of turbulence these past few years, and while persisting global pressures continue to pose challenges from disrupted supply chains and energy supply to the dwindling availability of talent, 2024 could be the tipping point for a new era to come. The rapid growth during 2021 and the first half of 2022 turned into softness in some markets and a sharp decline in others. This decline is attributed to multiple factors including inventory destocking, food and beverage consumption moving back to normal, and consumers' fears of recession. Major label and packaging media suppliers reported a sharp 15-20 percent decline in sales for the first half of 2023.

Digital print of labels and packaging did not escape this softness; however, the impact was moderate. The 10-15

percent annual print volume growth rate turned into a modest single-digit growth.

The uncertainties of growing geopolitical tensions have thrown the question of secure and stable supply chains once again into the spotlight. As good supply has become less trustworthy and freight costs have continually spiraled, much of production has shifted back to the US and Europe, enabling converters to take a more local approach to business, while slashing expensive and unsustainable transportation. The issue of good demand however is another concern, while today we can see evidence of recovery in some areas, the reality is the impact is still there.

Hybrid Software Group, Mike Rottenborn, CEO

In 2024, we see three converging trends driving the growth of the label industry. With brands and consumers alike concerned about climate change, sustainability considerations including faster lead times and shorter production runs will continue to drive the migration of labels and packaging to digital printing devices. Modern inkjet and electrophotographic digital presses can match the print quality of flexo, offset and gravure printing, and solutions for digital embellishment and variable data are available for high-value labels.

As run lengths become shorter, it's logical that the total number of print jobs will increase. A recent study by Smithers predicts an increase of 15 million packaging jobs per year by 2027 in Europe and North America alone, and perhaps 50 million more jobs worldwide. Managing such a high order volume will require powerful workflow automation tools like Hybrid Software's Cloudflow for design preparation and layout, color management tools to match brand colors with digital colorants and facilitate the movement of jobs between digital and conventional presses, as well as integration with ERP and scheduling systems.

The third trend is the acceptance of software-as-a-service and cloud computing. The printing industry has been relatively slow to accept these technologies, stemming from a reluctance to entrust customer files and proprietary business data to shared computing environments. However, the shortage of skilled IT employees and the ever-increasing threat of malware and ransomware from bad actors worldwide have made hosted SaaS solutions quite desirable to brands and label printers.

Konica Minolta, Sacha-Vittorio Paolucci, head of industrial print business development

In a world of uncertainty where a perceived global downturn in overall print production is part of the equation, it is heartening to see that digital labels, packaging and embellishment are shining brightly.

A need for greater automation and innovative end-to-end ecosystems will continue to be high on the agenda and an essential driver forward for industry stakeholders such as converters, brands and suppliers. An increased focus on complete production workflows in packaging and label sectors is also helping converters rethink possibilities in a world of new opportunities.

With labeling and packaging requirements becoming ever more complex as data demands grow, compliance and regulatory environments tighten, the supply chain increasingly relies on labeling as a vital source of traceability.

All these factors point to a narrative that Europe's digital label and packaging markets – and indeed those across the world – are poised for yet more substantial growth. Despite the buoyancy in digital label-making, overall growth predictions for the sector are said to have a 'soft outlook'.

Label Traxx, Rob Mayerson, president

In 2024, we see the label converting industry further accelerating

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Inks, Coatings and Varnishes sets out to explain the entire inks and coatings value chain, from ink manufacture to the chemical properties of different ink systems, how they are dried or cured, and how inks and coatings are specified for different end use performance requirements. It is an essential resource for anyone involved in the label converting market.

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the adoption of automation in all stages of the production process, from prepress to invoicing. Labor challenges and digitization have encouraged companies to invest more in automation to maintain productivity and quality. Ultimately, the goal is for a more flexible, predictable, and accurate production process.

Enabling seamless integrations — and trusting this process — is key to creating a system of 'lights out production'.

Lemorau, Natália Lopes, marketing director

Reflecting on 2023 with considerable growth, we believe in 2024, the label and packaging industry will be facing ongoing political and economic turbulence, particularly the high interest rates, will create challenges for businesses and certain investments.

With that in mind, we think converters will try to invest wisely by making better use of their equipment and producing more items on each machine. Sustainability and brand protection will be more critical in the industry than ever. Regulations will increasingly impact label design, material choices, manufacturing methods, and the need for better recyclability.

Another ongoing issue is the shortage of trained workers. Indeed, there will be a strong demand for user-friendly machines with increased automation features. Converters will likely favor all-in-one solutions over multi-process options.

Loftware, Josh Roffman, executive vice president of marketing

In the tumultuous landscape of 2023, the supply chain has witnessed a surge in complexity and volatility.

Heading into 2024, corporate leaders need to have their finger on the pulse of global supply chain health, identifying where operations need to be adjusted. Loftware's annual survey of customers and partners revealed some key areas where business leaders are focusing their attention over the coming year.

The focus on sustainability has become an undeniable force across the modern business landscape, with a surge in regulations poised to reshape the way companies operate.

As we head into 2024, we expect automation - driven by cloud technology - to play an important role in ensuring businesses are compliant with both current and upcoming climate regulations.

In recent years, consumers have demanded greater supply chain efficiency and transparency, partly driven by a desire to understand where and how a product has been sourced and manufactured. With this in mind, it's no surprise that 79 percent of survey respondents flagged global traceability as a priority for their company - an increase from 70 percent just 12 months ago.

Lombardi Converting Machinery, Nicola Lombardi, marketing manager

As we embark on a new era, the labeling industry sails into uncharted waters, driven by technological advancements led by companies such as Lombardi Converting Machinery, dynamic shifts in consumer behavior, and an increasingly tangible commitment to sustainability.

A paradigm shift towards sustainability takes center stage in 2024. A transformative shift towards labels made from recycled and biodegradable materials is observed.

Taking center stage in 2024 is a significant push toward hybrid/digital technologies in the label industry.

Moreover, the prevalence of 'smart labels' integrating RFID and NFC technologies is on the rise, offering real-time traceability, authentication, and increased consumer engagement.

Mark Andy, Tom Cavalco, executive vice president

As SKUs continue to rise, as run lengths decline, and the demand for fast set-up times increases, label converters will need to

be agile with their production capability - whether they are producing with traditional flexo or digital technology. But most likely they are producing with a combination of both - so what better than a hybrid?

In the 13in (330mm) web width sector that typifies label converting, predictions are that the sales of digital presses will rival those of flexo presses in 2024 and beyond. This is attributable to both a change in market demand and the ongoing development of digital technology.

A consequence of this will be the move of pure flexo lines into wider web widths and more sophisticated lines that will allow the single-pass production of flexible packaging, shrink sleeves and folding cartons.

Monotech Systems, Tej Prakash Jain, managing director

Anticipated trends in the upcoming year are set to reshape the label industry. Flexo players are expected to undergo significant upgrades, transitioning to wide web applications to effectively cater to the expanding packaging landscape. Simultaneously, digital players are poised to enter both narrow and wide web formats, strategically targeting the rising demands in sectors such as pharmaceuticals, health supplements, cosmetics and luxury products.

A notable trend on the horizon is the increasing adoption of digital label embellishments, as brands seek innovative ways to make their products stand out on retail shelves. This shift is driven by the desire to enhance brand visibility and create a lasting impact on consumers. Furthermore, the demand for short and medium runs is projected to remain robust, driven by market needs for quick-turnaround mockups, overnight product launches, and the rising importance of personalization and customization.

MPS Systems, Tim Klappe, managing director for Asia Pacific

The GDP growth in Asia Pacific is expected to be lower in 2024 than in 2023. However, the interest rates are coming down and the exchange rates in Asia are expected to become stronger. That makes it easier to invest. The growth forecast for the label business in Asia Pacific remains really good. This is driven by the general economic development of the countries in the region, e-commerce growth and therefore logistics labels and short-run labels with many different designs (SKUs), the need for anti-counterfeit labels and sustainable labels plus stricter regulations concerning labeling. On top of this, we see more label printers delving into flexible packaging. The reason is the shorter runs in flexible packaging and the possibility for narrow web presses to print flexible packaging at a lower cost than CI presses and gravure presses for runs below 25,000 meters. With the further development of sensor technology and AI, we see more label printers embracing the possibilities this gives to them in evaluating and improving the performance of their equipment.

Nilpeter, Martin Teilberg, global marketing manager

As Nilpeter reflects on 2023, the year is distinctly marked as the era of flexography. There's an unequivocal belief that the synergy of flexographic methods with digital and automated solutions holds great promise for the coming years.

Expanding on this, Jesper Jørgensen, Nilpeter's global sales manager, highlights the market's deep dive into the automation capabilities now offered by flexo. It's increasingly perceived as a viable alternative to digital solutions, not only in terms of performance and productivity but also due to its advantage of not binding customers with costly subscriptions or obligatory expensive service agreements.

Our flexographic technology is advancing rapidly, allowing us to now provide valuable data on overall equipment effectiveness (OEE) and environmental, social and governance (ESG) metrics,

alongside detailed performance data down to the batch level. This wealth of information is heightening interest in flexo, which fundamentally operates as an 'open source' solution regarding consumables like inks and materials. Consequently, we are witnessing a significant surge in demand for our flexo technologies and look forward to further development in 2024 and beyond.

Omet, Marco Calcagni, sales and marketing director

The events of recent years seem to have destabilized trends and cycles, but today Omet has managed to find a balance and record a significant reduction in costs. At a product level, we are investing as always in innovation and are bringing to the market printing machines considered by customers to be revolutionary in terms of technological level, production capacity and ease of use.

There are great possibilities for development and growth in the future, but to seize them you need passion, technology and the ability to read the market which, in addition to demanding excellence in products, is increasingly oriented towards service. This is why one of the areas in which we are investing heavily is Galileo, the customer care division which deals with 360-degrees assistance and is of strategic importance for the productivity of our customers.

Sandon Global, Richard Millington, managing director

In a global market where prices are increasing, we must take advantage of the opportunities available to us in terms of manufacturing and technological advancements.

Over the next 12 months, we believe that our industry will continue to develop around Industry 4.0 enabling printers to make proactive decisions that will reduce downtime and increase profitability when making new investments. Companies will need to push the boundaries and invest in digitization and automation to remain competitive and improve their business processes to enhance productivity, flexibility and agility.

Of course, service, product quality and innovation will remain a prerequisite for success in the world of label and package printing, and close collaborations with OEMs and other industry experts will help to drive transformation and push the print industry forward.

Screen Europe, Carlo Sammarco, business development director for labels and packaging

The label printing industry is poised for a dynamic evolution in the coming year, with several notable trends shaping its future trajectory. One prominent theme is the continued integration of digital technologies as label printers increasingly adopt advanced inkjet and digital printing technology. This shift allows for greater customization, shorter print runs, and enhanced variable data printing capabilities to meet the rising demand for personalized packaging. As consumer awareness grows, brands are likely to prioritize sustainable label options (eco-friendly materials and low environmental impact production processes). In the coming years, different countries and regions continue implementing stricter environmental regulations which need to be addressed by label converters. In response to these demands, label manufacturers will explore new solutions that are not only environmentally friendly but also economically and operationally efficient. Furthermore, automation and Industry 4.0 concepts are expected to streamline workflows, increase efficiency, and reduce production costs.

Sun Chemical, Jonathan Sexton, marketing manager for energy curing products in Europe

Sustainability continues to grow in importance as a key driver in the labeling industry and this is expected to continue in 2024

despite global challenges posed by weak demand, cost inflation, supply chain vulnerabilities and increasing regulatory demands. Sustainability will continue to drive technical innovations such as UV LED, which can deliver cost and efficiency improvements, as well as influence future print technology choices. It is important to note that no single print technology is inherently more sustainable than another as there are many complex and competing factors. A full lifecycle analysis (LCA) is required to draw valid conclusions regarding sustainability impact. Print technology could be better for some specific scenarios, but probably not for all packaging applications.

Tecnocut, Franc Estrada, chief engineer officer

Labelexpo Europe marked an important milestone in 2023, and if there is one thing the show is known for, it is highlighting the most significant trends and developments in the sector that are shaping the label industry in 2024.

One of the main observations was the continued emphasis on sustainability. Companies will continue to show significant progress in the adoption of eco-friendly materials and more environmentally responsible production processes, reflecting growing market demand and corporate social responsibility. In essence, sustainability is becoming synonymous with the industry's identity.

Digitalization will also lead the way in the year ahead. The integration of digital technologies in label design and production will be one of the industry's priorities. From implementation in rotary machinery to advanced digital printing, companies are increasingly looking for ways to improve flexibility and personalization.

Closely linked to this, another long-standing trend is process optimization. The industry is increasingly turning to innovative technologies designed to improve efficiency in label production. From faster and more efficient machinery to software solutions that optimize workflows. The search for operational efficiency will undoubtedly mark the coming year.

Weldon Celloplast, Harveer Sahni, chairman

With the Indian government promoting 'Make in India', encouraging start-ups, a booming e-commerce, and a huge young generation of consumers with disposable incomes rising, despite the competition and depleting margins, the label industry in India continues to register robust growth. We can look forward to growing investments in this sector. Digital has been slow for obvious reasons of high capex and high cost of consumables, but with the start-ups and customization fueling demand for short runs, digital will steadily make inroads into label printing. Sustainability has been a hotly debated topic and we will see the evolution of sustainable products because of specific demands of brand owners or FMCG manufacturers.

This year, we've garnered a substantial volume of contributions from leaders in the label and packaging industry, encompassing the entire supply chain and the converter sector. Given the constraints of space in the magazine, we could only feature a curated selection of predictions, some in abridged formats. To access the complete version of the article, please scan the QR code or visit bit.ly/predictions-2024.



In this issue, we look at the trends impacting each global region. Turn to page 80 for more.

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Polilux today exports material to 26 countries and this number reached in only 3 years after establishment. The company has only one purpose as to be a leading producer of special products. As a consequence Polilux launched its first BML (Blow-Moulding Label) product in 2022 and the company is producing high quality of PSL Facestock material which can serve high end market since January 2023. Polilux invested the first of its kind investment which will be the only one in the World. The main purpose of this investment is to match with company's objectives as to be leading special product supplier.



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Mercian Labels targets lights-out converting

The UK converter has embarked on a journey with industry partners ABG, Cerm and Screen to realize a fully automated non-stop digital label converting operation. Andy Thomas-Emans reports

Mercian Labels claims to have implemented a huge stride forward toward the first truly 'lights out' workflow at a label converting plant in an award-winning collaboration with ABG, Cerm and Screen.

'What we have here is an automated nonstop process for the conversion of complex, short-run digital jobs,' explains Dr Adrian Steele, managing director at Mercian Labels. 'The only operator intervention is to feed cores to the turret rewind and change die plates.'

Matt Burton, international sales director at ABG, confirms: 'This is without doubt the most automated and integrated project we have undertaken.'

Mercian Labels and its partners won the Team Achievement Award for the 'Lights-Out' project at Labelexpo Europe 2023.

Founded in 1969, Mercian Labels moved to its current 24,000sqft plant in Burntwood, Staffordshire in the UK a decade ago to house its expanding range of equipment, which now includes Edale narrow web flexo presses, and both Screen and Xeikon digital presses, along with a range of finishing equipment.

The company specializes in short-run work incorporating complex variable data elements for end-user markets, including e-cigarettes, pharma, chemicals, food and blood products. Generally, these products do not require any embellishment aside from a gloss or matte over-varnish.

Steele first considered the lights-out concept as far back as 2016 after Mercian Labels adopted Cerm as its ERP provider.

'Matt (Burton) and I met and defined a lights-out vision. I wanted to be able to take a 1,000m reel containing 10 different jobs, each job consisting of 10 SKUs of different roll sizes for a total of 150 rolls. I wanted to be able to load that into a converting machine, turn the lights out and see 150 inspected, finished reels coming out the end.'

At that stage neither ABG nor Mercian were ready, recalls Steele. 'I believed it was an essential transition for the label industry, but we did not know how we would bring it about. Our view was, this has to be done by someone, and together we were very well placed to tackle this "elephant in the room" so we decided to start on that journey.'

It took the best part of three years to fully replace Mercian's previously self-built ERP with the Cerm MIS and to understand how to drive it effectively. At the end of that process, the company's productivity had already nearly doubled. By 2019, Steele felt the

"The specification called for every process to run on the Digicon instructed from a QR code digitally printed at the head of each new SKU, automatically imposed by the digital print engine via the job JDF"

pieces were finally in place and in 2020, feasibility and design studies were undertaken for a system that would allow an automated ABG converting line to integrate seamlessly with Cerm and the company's digital presses.

'This did require a huge cultural shift for both Mercian and our suppliers,' says Steele. 'The usual approach prior to this is you install a new machine and there is no integration. Companies in the label industry are not used to building machines that interface with other people's machines and ERP software.'

ABG gets to work

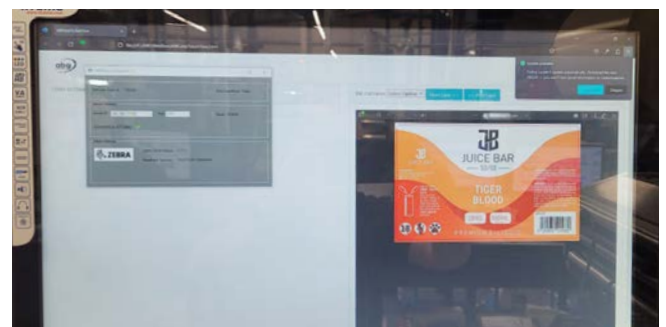
'I was clear that this is the way the market is going to go,' recalls Burton. 'We looked at the sheet-fed business for our model with its high levels of automation and digital integration. But you cannot simply bolt a system like this together. It took us six to 12 months just to work out a way of taking a JDF (Job Definition Format) description of the job from Cerm all the way to the automatic setting of the ABG Digicon so it could run itself.'

Burton emphasizes that the converting line installed at Mercian is a standard Digicon machine. 'All these modules have been around for a long time, but up to now, we have not managed to get them automated and integrated. This is the first machine where we have applied the full ABG Connect Server software. The only new hardware required was a QR code reader and a Windows PC built into the Digicon.'

The specification called for every process to run on the Digicon instructed from a QR code digitally printed at the head of each new SKU, automatically imposed by the digital print engine via the job JDF. The Digicon should operate nonstop, and everything would be turreted.



A Cerm SKU closure label generated from the FlyeVision inspection showing an A grade for each of the 500 labels in the roll



Thin red line on PDF layer shows operator where to position die-cut in register to print

The project had to be paused during Covid, so the Digicon was not installed until October 2021. It took nine months from installation to be fully up and running as Mercian adapted and debugged the new software architecture into a stable, fully production-ready platform.

Screen joined the project in 2021. The integration process was made easier because Screen's Equios software already had a basic integration to Cerm's MIS. The Screen press was able to process job information from Cerm's JDF file and generate QR codes to run the Digicon automation.

Mercian's Xeikon CX3 press can also drive the Digicon, as its X800 workflow already connects to CERM.

Culture change

The Lights Out project required a change of culture and organization at Mercian Labels, with responsibility for setting up each job on the Digicon effectively shifting from the machine operator to the sales administration function.

'We had to understand how to enter data into the Cerm ERP with a whole new level of accuracy and how to check it is correct, so the front end was the key,' explains Steele.

A new operational position was created called the technical sales administrator. That person takes a job order from the sales team and sets it up in Cerm, outputting a JDF file which will eventually drive both the Screen digital print engine and the Digicon via a series of JMF (Job Messaging Format) commands.

'Responsibility for correct machine operation now moves from the operator to this person,' says Steele. 'The key skillset here is accuracy. We have created two new roles. One candidate was new to the industry and the other had moved from a hot foil operator,



The Lights Out team from ABG, Cerm and Mercian win the Team Global Label Award

so neither were IT specialists.'

ABG developed a novel pre-flight program that checks the JDF to ensure that the printed job will run smoothly through the automated Digicon.

'This is now a key part of our ABG Connect software, so you can't put a job on the machine that will not work,' explains Burton. 'This is currently the only JDF pre-flight software in this market with full ERP integration.'

A practical example of how this new workflow operates would be the application of a gloss varnish. The Digicon has two flexo stations, one for matte and one for gloss varnish. When the sales team selects 'gloss' this is coded into the JDF. The Screen press then prints the associated QR code which, when read on the Digicon, engages the appropriate flexo unit and the GEW AeroLED LED-UV lamp. This all takes place with no operator involvement.

The automatable processes on the Digicon line includes auto



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“You cannot simply bolt a system like this together. It took us six to 12 months just to work out a way of taking a JDF description of the job from Cerm to the automatic setting of the ABG Digicon so it could run itself”

flexo varnish on/off for the two varnish stations, auto back slitting and auto knife-box setting with non-stop matrix extraction and turret rewinding. Although core loading is manual, an automated core stop driven by the JDF ensures exact positioning of the correct size of core ready for presentation to the glueless turret wrap head.

The Digicon's automatic registration system reads a printed line on the edge of the web rather than an edge guide ensuring that tiny variations in distance from the edge of the web to the center of the print make no difference to the finished roll quality.

Inspection and QC

The inspection system is ABG's own FleyeVision technology and tightly integrated into the automated workflow. The QR code at the head of each new SKU calls up the related PDF image to the ABG Connect Server from the Cerm-connected file server, which displays a multi-SKU stitched image on the monitor in preparation

for automated comparison to the golden image.

The FleyeVision camera inspects 100 percent of the print and grades the finished roll A (pass) or B (rework may be required).

A JMF message is then passed to Cerm which instructs the printing of a closing label for that roll. The closing label contains the A/B grading along with full material tracking from the original EPSMA data from the raw material supplier, and shipping information pulled from the Cerm ERP. This information is scannable as a barcode. 'Each roll has been booked into stock before it leaves the machine,' says Steele.

The FleyeVision camera generates a roll map for the 'B' rolls which allows the QC operator to assess whether detected faults are outside commercial specifications. The B roll is then placed onto a networked inspection/rewinder which stops the roll at each defective label for removal or replacement.

A further automated step is to call up an automatically generated die-line file from the prepress workflow onto the Digicon's monitor screen which assists the operator in manually positioning the flexible die relative to the print. Camera assistance uses industry-standard register marks on all flexible dies to enable exact die-cut position, typically within two meters of web.

Quick-change mandrels were also specified so an operator can perform an SMED swap from 76mm to 44mm core sizes in under four minutes.

Mercian has developed a direct EDI link to RotoMetrics. Cutter imposition profiles are automatically generated by the Cerm system and sent electronically as XML files for automatic import into RotoMetric's ERP using Cerm's die-cutter tooling export format.

The waste between jobs is a regular three meters, which is the

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minimum length required to prime a glueless turret roll. This waste is used productively to repair reels to 100 percent and to provide a retained sample for BRC purposes. Customers are encouraged to return their cores for reuse.

'Waste is now predetermined by the system, and is not dependent on operator skill levels,' reports Steele. 'So now waste is a known quantity set by the TSAs and optimized by the operations team in a Plan-Do-Check-Act cycle.'

Powerful impact

The most powerful way to understand how automation has impacted Mercian's operations is to compare the same job before and after automation. Steele gives the example of a job digitally printed and converted conventionally in June 2022 in a two-stage process involving converting and rewinding. The job was for 117,600 labels in 102 SKUs, which totals 112 rolls with 1,050 labels per roll. Total work time was just under six hours.

The same job was printed again in September 2022 but now automated with ABG Connect in a one-pass non-stop operation taking 1 hour 46 minutes – a 74 percent cutback in total work time.

'So far we have had zero complaints and no rejects relating to our automated finishing,' says Steele. 'We've never had a wrong slitting pattern or the wrong varnish. We now have 94 percent of jobs going on-time in-full (OTIF) with a three-day lead time.'

The Digicon line reports real-time production data from the ABG Connect Server back to the Cerm MIS, and the Screen press similarly reports a range of data back to Cerm, including, for example, ink consumption per job.

'Our production costing is now much more accurate – and we have that costing information even before the job is printed,' notes Steele. 'This is critical as we have very few repeat jobs.'

Next steps

As we have seen, there are still some process steps which require manual intervention. Achieving a fully non-stop process would require fully automated die loading, automated digital embellishment and core cutting on demand.

Automated die loading would require registering Mercian's extensive die library, which amounts to multiple thousands of dies. 'It would be prohibitive to have all these remade with a bespoke registration marking to enable full automated loading, registration and ejection. So there will remain a limitation on the speed of die changes on the Digicon where legacy dies are used,' says Steele.

Laser die-cutting was not considered even though it is available with ABG Connect. 'Laser is too slow and the risk of liner damage is too high for our marketplace,' states Steele. 'So at the moment, changing die plates looks like a difficult lights-out proposition to make commercially viable. Technically it is possible, and Matt (Burton) and I have discussed a way forward, but the commercials simply aren't there to pursue it at this time.'

What about replacing the flexo varnish units with inkjet? 'We did not want, at this stage, to push the boundaries to introduce fully automated digital embellishment, but this will be our next step,' confirms Steele. 'For us, it is just another PDF layer in the design file, in exactly the same way as a die-cut line.'

Burton says this is a priority area of development for ABG. 'We are working on adding our digital embellishment technology into ABG Connect to provide further benefits to Connect customers and take digital finishing to the next level. We are ... offering automated core cutting with Connect to cut cores on demand. The next step is to automate the loading onto the machinery. Customers are helping us understand what the requirements are.'

Conclusion

Implementation of the Lights-Out project at Mercian Labels called for a major change in mindset.

Mercian Labels		Autoplan		758404	
Customer Representative		(105779)			
Created by		157125		Total quantity : 6,000 pcs.	
Calculation		27/03/2023 0:00			
Shipment date					
Printing form: 1 - 1448560001 199m					
Lane 1 517252		Lane 2 517253		Lane 3 517254	
					
517252 Juice Bar 100 ml 0mg - Banana Ice				1,500 cps. Proof OK	
517253 Juice Bar 100 ml 0mg - Fresh Mint				1,500 cps. Proof OK	
517254 Juice Bar 100 ml 0mg - Tiger Blood				1,500 cps. Proof OK	
Printing form: 2 - 1448560002 97m					
Lane 1 517255		Lane 2 517255		Lane 3 517255	
					
517255 Juice Bar 100 ml 0mg - Vinto				500 cps. Proof OK	
				500 cps. Proof OK	
				500 cps. Proof OK	

Screenshot of CERM paperless job ticket for an example 4 x SKU mixed 6,000 label job automated on the ABG

Screenshot of CERM paperless job ticket for an example 4 x SKU mixed 6,000 label job automated on the ABG

“This did require a huge cultural shift for both Mercian and our suppliers. The usual approach prior to this is you install a new machine and there is no integration”

'A continuous improvement culture is vital to start the journey towards automated finishing,' says Steele. 'It is a strategy and not just a purchase, and the ramp-up from installation took us nearly a year. Support from your digital print technology provider is essential to present jobs that are convertible via automation. And you need a high-quality ERP like Cerm or a very strong software team if you are developing your own system.'

While most customers think they are not ready for automation yet, this is simply not the case, adds Burton. 'The first requirement is that an ERP system must already be in place and most converters are still in the paper-based job ticket world and not the world of JDF.'

To support converters on this journey, ABG Connect will be available in three levels: basic, standard and Connect Plus (the system implemented at Mercian). 'We want to show that the advancements on this project are available at some level to all converters and that they can embark on the journey and increase automation levels as they progress,' says Burton.

Another key point is suppliers must break out from their own closed ecosystems. 'Before this project, we were just focusing on our own kit,' says Burton. 'That's what we've learned most from this. We need to look at how things integrate rather than just chasing faster speeds. This is not always what is wanted.'

Cybersecurity was another issue not considered before.

'This was a complex integration into a live ERP and so we had to consider the key issue of cybersecurity since it involves integrating a Digicon directly to the "crown jewels" of Mercian's ERP and IT servers,' says Burton. 'Automated printing and converting machines need to be patched and secured like any other endpoint in a network.'

Automation and integration on this level are easier to talk about than to do. The labels industry needs pioneers like Mercian Labels and its partners to put in the hard miles and light the way ahead for the wider industry. L&L will be returning to Mercian to see how the project progresses.



ABG's latest automated finishing equipment can next be seen at Labelexpo Americas 2024

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Omet showcases folding cartons at open house

Celebrating its 60th anniversary, Omet demonstrated a folding carton converting line, three label presses and announced an AI-based digital communications platform. Andy Thomas-Emans reports

In December, Omet hosted an open house at its Innovation Park in Molteno, Italy, to showcase an in-line carton system before it was shipped to a customer. This came at the end of the year as Omet celebrated its 60th anniversary.

The event started with a welcome speech from Marco Calcagni, Omet sales and marketing director, who expressed his satisfaction with the results achieved in 2023 in collaboration with the company's technology partners. Partners present at the event included BST, Ecoleaf, Flexo Wash, GEW, Nazdar, Rossini, Simec Group, Simonazzi, tesa and Zeller+Gmelin.

Sfera

Michele Spreafico, Omet's remote service technical and service digitalization project leader, introduced Sfera, the company's new digital platform, which monitors in real-time all connected Omet machines, analyzes its data, and assists customers in making better operational decisions.

'The digital transformation of enterprises has become a strategic priority to remain competitive in today's ever-more dynamic and demanding market,' says Spreafico. 'This transition involves leveraging advanced solutions based on the Internet of Things (IoT), Artificial Intelligence (AI) and Cloud Computing. Embracing these innovations enables a company to achieve several objectives: operational efficiency, competitiveness, customer insights, cost reduction and innovation.'

Spreafico explained that the IoT is a set of technologies aimed at creating an interconnected network of physical devices capable of collecting, analyzing

"The main point of interest was an Omet Varyflex V2 line configured for in-line folding carton production"

and sharing real-time data, opening a wide range of opportunities for intelligent monitoring and advanced management of business operations.

'Omet aims to be at the forefront of this transformation,' says Spreafico. 'Sfera is the result of this vision, Omet's industrial IoT solution. This digital platform is designed to handle various crucial aspects of connected machines and production lines, fully harnessing the potential of AI. With this innovative project, Omet puts a powerful tool in the hands of its customers to tackle the challenges of Industry 4.0.'

The Sfera platform offers a wide range of functionalities, including efficiency analysis, bottleneck detection, process telemetry, monitoring of energy consumption and preventive as well as predictive maintenance. Access is provided through a web app, divided into modules with specific permissions and roles, to enforce data security.

'With Sfera, the converters are constantly connected to the beating heart of the plant, no matter where they are. In fact, the application is also accessible from mobile devices, such as smartphones and tablets, allowing managers to monitor and manage

the workflow in real-time.'

Alessandro Chiodi, Omet marketing specialist for aftersales and service, provided a preview of Gaia, an AI-based chatbot capable of addressing Omet customers' technical questions in multiple languages. 'This will offer 24/7 assistance that extends beyond troubleshooting to provide maintenance suggestions, optimization tips for machine usage and training for operators,' says Chiodi.

Press demos

The main point of interest at the open house was an Omet Varyflex V2 line configured for in-line folding carton production for the food, tobacco, cosmetic and FMCG markets. The press was due to be shipped to a customer after the event. It will be configured with a non-stop unwind, web cleaner, corona treater, 10 flexo units, two rotogravure units with chill drum and extended hot air dryers, a cold foil unit and a final vertical flexo unit with hot air dryer. All print units are equipped with the Omet Vision registration system. The converting section of the line includes a decurler, embossing station, creasing station, and rotary die station, followed by matrix removal, BST Tubescan inspection system and flying cut sheeter. On the delivery is an accelerator/de-nesting unit and a shingling delivery table with the option of using a high-pile stacker.

Omet will showcase its latest press systems at Labelexpo Americas 2024



Varyflex 2 carton line with ten flexo, two gravure and hot air coater

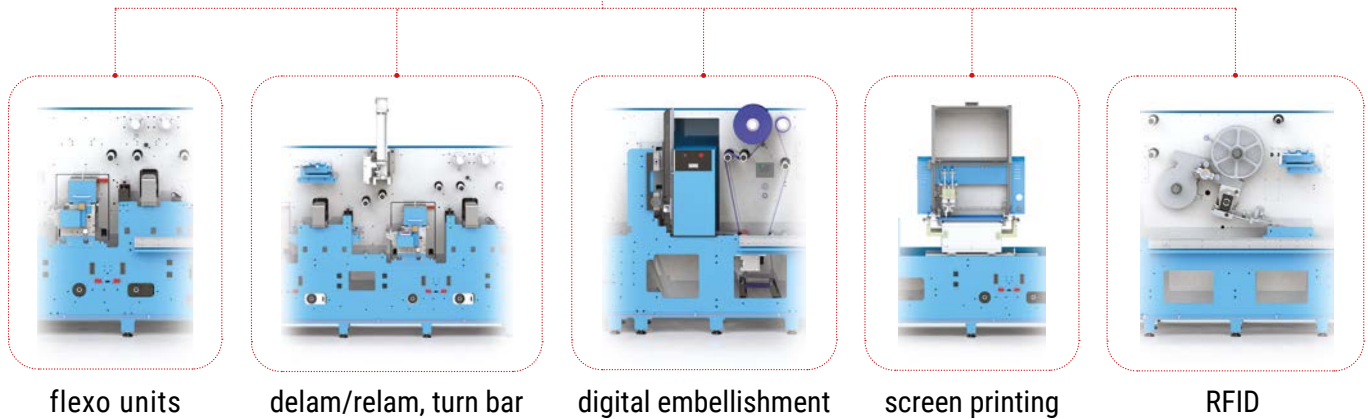
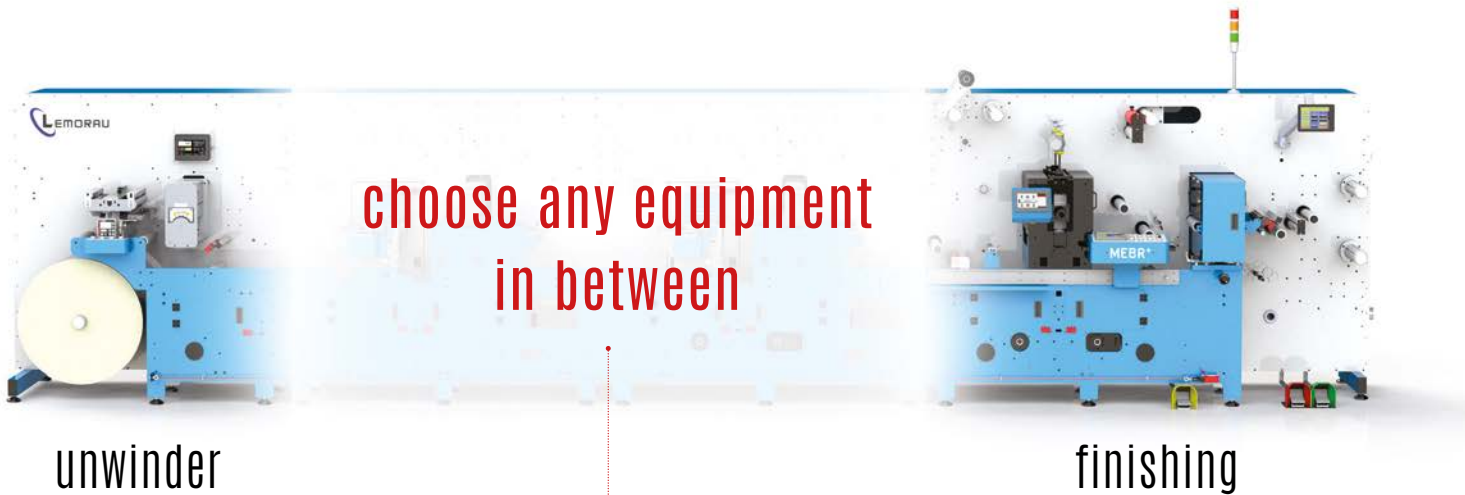


Marco Calcagni, Omet sales and marketing director



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Eco Flexibles installs first Fujifilm FP790 digital press

Fujifilm's new FP790 water-based inkjet press has passed its beta testing and looks set to further disrupt the flexible packaging market. Andy Thomas-Emans reports

UK-based Eco Flexibles has taken the printing of flexible packaging in-house with the installation of the first Fujifilm Jet Press FP790 digital press outside Japan.

Located at Eco Flexibles' new state-of-the-art 40,000sq ft factory in Northampton, the water-based inkjet FP790 will form a central part of the company's sustainable flexible packaging proposition.

Eco Flexibles develops recyclable mono-polymer flexible packaging constructions that provide equivalent or improved performance over incumbent mixed plastic designs, as well as paper-based packaging.

The Jet Press FP790 press was installed at Eco Flexibles in August 2023 and completed beta testing in December. It is now operating commercially over two shifts. With capacity rapidly filling up, a second press is already planned.

Jet Press FP790

The Jet Press FP790 reverse and surface prints (on films and paper) in CMYK+ double white at 50m/min (164ft/min) on a 790mm (31in) wide web with a print width between 520 – 733mm (20.5 – 28.9in).

The 1,200 x 1,200 DPI inkjet heads jet from heavy coverage down to 2pt positive type and 3pt negative text.

The press has been qualified to print on 12-40 micron PET, BOPP and paper, and Fujifilm says most common flexible packaging materials can be used after preliminary testing. Registration is automatically controlled within +/- 0.15mm (5.9thou).

The press has three coating and print towers. The first is a web conditioning station incorporating corona treatment and flexo coater applying a water-based primer, followed by heat drying boxes and chilled roll. The primer is used to improve ink anchorage on plastic films.

The second tower houses the CMYK print heads on a retractable rig with automatic head cleaning. The pigmented water-based inks were developed by Fujifilm with a high color density which allows over 90 percent of Pantone colors to be matched with just four colors. Again, there are powerful heat boxes to dry the inks followed by a chill drum.

The third tower is for the double white inks, which Fujifilm says outperforms flexo with a combined opacity of 55-58 percent.

CMYK+W inks are compliant with a range of food contact regulations including Nestlé, Swiss Ordinance, EuPIA guidelines, EU regulatory framework, GMP and FDA. The inks are currently manufactured in Japan, but manufacturing is likely to be rolled out to the US and Europe in the future.

After the inkjet unit, is an integrated inspection tower delivering 100 percent defect detection and automatic nozzle compensation to prevent the appearance of white lines in the event of a blocked nozzle.

Niche positioning

Eco Flexibles is an excellent example of how the Jet Press FP790 could further disrupt the flexible packaging market.

The company has two main divisions: Creation, a repro/platemaking house; and Eco Flexibles, a supplier of sustainable



L-R Simon Buswell and Matt Francklow

“This is a transformative moment for the flexible packaging industry in the UK, and for us as a business”

flexible packaging films. In the past, Eco Flexibles outsourced the printing and laminating of these films to wide web flexible packaging converters.

Interestingly, it was through Creation, the platemaking side of the business, that Eco Flexibles first came into contact with Fujifilm through an investment in Flenex water-based plates and processors in 2021. Flenex forms a core plank of Creation's 'net zero' reprographics offering.

'A wider conversation about the future of sustainable production led to a trip to Japan where we introduced Eco Flexibles to the Jet Press FP790,' recalls Manuel Schrut, head of packaging at Fujifilm EMEA.

Says Simon Buswell, director of Eco Flexibles: 'Our initial focus was on materials development for sustainability, but we always said we would start printing ourselves if the right technology came along. There was no way we were going to set up a flexo operation. Flexo is more about volume, and we could see run lengths were coming down and the number of SKUs increasing, which means more make readies and waste in a flexo operation. Our end customers are also facing supply chain issues with the need to reduce inventories. Also, we did not want to be handling solvents. Then Fujifilm started talking about bringing to market this water-based inkjet press that would fit into a standard flexible packaging workflow – that bridges flexo and digital – and would fit perfectly into our sustainability strategy.'

The Jet Press FP790 was developed from the ground up to fit seamlessly into existing industry workflows. 'This is where we are different from digital-only suppliers - Fujifilm comes from the analog world of inks, LED curing systems and plates,' says Manuel Schrut. 'This press is designed to fit into a mainstream flexible packaging workflow, to print mainstream flexo jobs at rotogravure quality and fit into existing production processes. Jobs can be



Fujifilm FP790 at Eco Flexibles



Print samples

“Fujifilm brought to market a water-based inkjet press that bridges flexo and digital and fits perfectly into our sustainability strategy”

laminated with the same laminator and go to the same pouch-making machine. Digital today needs to answer mainstream questions - so this is a different approach.’

Fujifilm developed the FP790 press along with key industry partners Henkel, Nordmeccanica, Karville and Hybrid.

‘We extensively tested Henkel’s portfolio of laminating adhesives to ensure compatibility on the Nordmeccanica laminator,’ says Schrott. ‘And we worked with Karville to ensure these laminates would work seamlessly on its pouch-making machine.’

Eco Flexibles installed a Nordmeccanica laminator, Ashe slitter/rewinder and a Karville pouch-making machine along with the FP790 press.

On the digital side, Fujifilm was able to use its experience developing the Jet Press 750S for the folding carton and board market, powered by similar 1,200 x 1,200 DPI Samba inkjet printheads. The company had also developed press-wide inkjet print bars for retrofitting to flexo presses or other analog processes.

Fujifilm engineers worked with Hybrid to develop the digital front end (DFE) for the FP790. Hybrid’s PackZ PDF editing software allows for the addition of trapping, white creation, dieline control, imposition and overprint control. Communication with the FP790 print controller is through Hybrid’s web-based Cloudflow software, with Global Graphics’ HQ-Direct providing RIPing to print. Infigo provides web-to-print software.

Jet Press in operation

‘This is a transformative moment for the flexible packaging industry in the UK, and for us as a business,’ enthuses Simon Buswell. ‘Our mission is to make recyclable monopolymer and paper packaging more accessible for brand owners, and with this

multi-million-pound investment, we’re providing our customers with digital press technology with all the benefits that it attracts – very short run and variable data printing, fast turnaround and outstanding graphic performance that more than rivals traditional analog print techniques. We are setting a new benchmark in quality and sustainability.’

All the materials sent down the press and through the lamination line have performed flawlessly, says Buswell, ‘with good peels and seals and meeting our customers’ shelf-life requirements.’

Eco Flexibles worked hard to bring its brand customers on this journey. ‘It is a question of cost versus speed. Brands will be paying more for inkjet compared to flexo or gravure, but they will get the job more quickly, in just the quantities they want, in gravure quality and with no waste.’

With its existing group expertise in reprographics, Eco Flexibles is in a position to color manage jobs between the Jet Press FP790 press and both flexo and gravure presses.

‘This would mean, for example, that brands starting with multiple SKUs on the digital press could ramp up to mass production on gravure or flexo and we can color manage this whole process,’ says Buswell. ‘The print quality of our digital press matches gravure and we can adjust the output quality to match flexo as well.’

Fujifilm’s Manuel Schrott presented figures that confirm the multiple forces pushing towards shorter runs in the flexible packaging market: more packaging redesigns, more multi-SKU orders and more regulatory changes requiring packaging design changes. ‘All this is likely to lead to excess inventory, which is a major cause of waste.’

Schrott noted an 8-fold increase in

redesign work since 2018, with multi-SKU jobs increasing to over one-third of all jobs in 2022 compared to just 7 percent in 2018.

Much of this shorter-run work is being driven by challenger brands which are now outgrowing the established brands in the UK market.

Schrott estimates that this has driven average flexible packaging run lengths down to an average of 8,000sqm.

This chimes with Eco Flexibles’ experience to date, with average run lengths on the FP790 of 5,000 linear meters, two to three across.

‘The press is very productive because of the width and speed,’ explains Matt Francklow, director of Eco Flexibles. ‘We are printing a total of 35,000sqm a day on just one shift with an OEE in the very high 80s. We can also print multiple SKUs across the web for additional efficiency. If required, we can print longer runs up to around half of an average flexo press run at a matching or greater quality level.’

Francklow says jobs as long as 20,000sqm are not unusual.

Going forward, both Schrott and the two Eco Flexibles directors see huge potential for further development in the water-based inkjet technology. For example, although the FP790 is rated at 50m/min, the press has been run considerably faster in trials. Matt Francklow also envisages a big increase in jobs incorporating variable information once brands catch onto the potential for marketing outreach and track and trace. ‘This is only the beginning,’ concludes Schrott.



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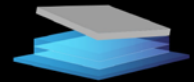
Advantages of mono-material labelstock compared to conventional labelstock

Conventional labelstock



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The evolution of Etiflex

The Mexican converter, a pioneer in data-led production, is further automating its operations with a new Cerm MIS. James Quirk reports

Etiflex's 11,500sqm facility in Mexico City

Mexican label converter Etiflex has come a long way since its foundation in 1981. Today considered one of the leading converters in the country and wider region, it is known as a pioneer in data-led production, variable information printing, tickets and RFID labeling. Etiflex serves a broad range of industries, including food and beverage, textile, automotive, personal care, pharmaceutical and cosmetics, as well as producing tickets for events and transport. Production takes place in Mexico City, and the company runs sales offices in Chihuahua, Guadalajara, Monterrey, Querétaro, Tijuana and Toluca.

In 1981 the company's founders, who had studied together at university, were working in different industries but liked the idea of starting a business together. They met at Loma Linda restaurant in Mexico City to hatch a plan, and shortly afterward founded Etiflex in a factory nearby.

It was just the first of many fateful decisions in the company's history to be taken in a restaurant. A coin toss in 1992 at Las Mercedes, near Etiflex's first plant, determined that Ari Vonderwalde would take operations and Sergio Shor sales. (Today they are co-CEOs.) The decision to install a first Nilpeter press in 2000 was finalized at a restaurant, as was the choice of a new, larger production site in 2017 – facilitated by sketches on the tablecloth. 'Most of our important decisions are made in restaurants,' admits Vonderwalde. 'Food has been part of our journey,' says Shor.

Early business

Etiflex's early business was printing price-marking labels and other basic products on a Mark Andy 820 flexo press. Importing assembled tools was a challenge, so the founders would break them down and reassemble them back in Mexico. Family members would help them finish labels by hand.

Sergio Shor, then a computer and electronic engineer, joined in 1990 and implemented Etiflex's first ERP system. After the company's original founders invited him to buy into the company, he took charge of the barcode label area of the business, at a time when retailers were beginning to mandate the technology.

Ari Vonderwalde, with a background in chemical engineering, joined in 1992, initially selling industrial barcode printers door-to-door and delivering labels in the trunk of his car. Etiflex was running three Mark Andy presses by then, all 3-color machines, yet was still focused on 1-color production. Vonderwalde learned on the job and the company began to increase its multi-color work. It was around this time that the fateful coin toss took place at nearby restaurant Las Mercedes, with Vonderwalde put in charge of operations and Shor taking control of sales.

"Most of our important decisions are made in restaurants. Food has been part of our journey"

Growth began to accelerate. Etiflex moved into the larger Dennison de México facility in 1995, following the Dennison de México's acquisition by Avery, and began printing textile labels. By 1997 it had moved premises again, begun the ISO:9000 certification process and started producing tickets for events and transport, having upgraded its Mark Andy presses to 5-color machines.

The focus remained on variable information applications until the installation of a Nilpeter press – the company's first from Europe – which brought more colors and a move into prime label production. Etiflex further broadened its portfolio and from that point began installing a new press every year, mainly from Nilpeter and Mark Andy. 'Our strategy is always to have twin presses, so if a supplier sells us one and we are happy with it, we will buy a second,' says Vonderwalde.

Etiflex began digital printing in 2010 with an HP Indigo. 'Before that, it hadn't made much sense to us,' recalls Vonderwalde. 'The early pitch was "Don't lose money on short runs". We weren't printing much short-run work for prime labels. But we studied it and began to see opportunities to move into new markets. Promotional labels, for example, became an important area. Having both flexo and digital printing was complementary – each technology helped bring opportunities to the other. Today, we are one of the top roll-to-roll printers in Mexico in terms of click-rate.'

RFID label printing began shortly afterward. 'Thanks to our travels and close relationships with associations such as AIM [see boxout] we could see that RFID was closer to barcode technology than to label printing,' says Vonderwalde. 'We didn't want to spend a lot of money on a big RFID label printing line, so we created our own. It's a flexible system with 10 colors, reverse printing, delam/relam, specific controls, and we can add different stations. We use it to print all our RFID labels.' Etiflex produces RFID labels for logistics, textile, automotive and industrial applications, among others.

In 2019, Etiflex was on the move again. 'The area around the factory was becoming more residential,' says Shor. 'The people who owned the land wanted to build on it. So we began looking for a new facility, visiting 30 or 40 places because we wanted to make the right choice and we didn't want to lose any staff. In a restaurant, we sketched notes on the tablecloth and that's how we

chose the new factory.'

The 11,500sqm building was just a shell when Etiflex bought it, so the company created a team to design the layout of the new plant, which remains its headquarters. It took six months to refurbish and a further three months to move equipment. The additional space allowed the installation of two more presses, further increasing capacity.

Less than a year after settling into the new factory, the pandemic hit. 'Sectors such as entertainment and transport basically shut down,' recalls Vonderwalde. 'We had to lay off some staff but fortunately, we were able to hire them back a few months later. The ticket side of the business suffered, but pharma grew, and e-commerce and food boomed.'

One impact of the pandemic, says Shor, was an increase in Etiflex's exports. 'We began to export to the US more during this time, and also to Central America. Previously we had exported less than 1 percent of our production – by late 2022 it had risen to 15 percent. Labor shortages in the US were part of the reason, as well as the material shortages, and subsequently the nearshoring trend. We source materials from many parts of the world – Europe, Asia, South America – so we can maintain a consistent supply.'

Data

Etiflex has a long-established culture of using data to measure and improve its productivity. It was an early adopter of the Sispro planning and production control system from Argentina-based UpSoftware and runs Microsoft Dynamics ERP software.

'We are pioneers in the area of collecting and analyzing data,' says Vonderwalde. 'What you can't measure, you can't control. Using KPIs and metrics is essential.'

Etiflex's latest development in this area is the installation in mid-2023 of an MIS from Cerm and software from Esko. 'The more informed our decisions are, the better,' says Vonderwalde. 'The Cerm and Esko software links all the different systems at use within the company.'

'The new system allows us to process orders more quickly, to better understand them from the very beginning, to better understand the cost of the label, and to be more accurate with delivery times. It will also allow us to track a lead to a sale.'

'Usually, we have around 1,500 orders in our pipeline. It is complicated to schedule everything efficiently. The Cerm MIS schedules the jobs in the most efficient order, specifying which machine to use for each job, and knows if it is possible to meet the deadline. It means you can tell customers in advance if there is a delay.'

'We want to continue to understand our productivity, to analyze, to keep improving our efficiency,' emphasizes Shor. 'The only way to be as efficient as possible is to automate the line as much as you can, and to have the best materials.'

With Etiflex so dedicated to data collection and automation, how do the co-CEOs view the potential impact of artificial intelligence? 'We have been working in business intelligence for a few years,' says Vonderwalde. 'I'm not saying that AI is embedded in our DNA – but it is going to happen. Soon it will give us the ability to predict areas of our business, which will be a huge advantage.'

What else does the future hold? 'One of our goals is to become an industry association-certified laboratory for material testing,' says Vonderwalde. 'We want to understand all the standards in the industry, from associations such as TLMI and Finat. Because of the scarcity of some materials during the pandemic, we spent a lot of time testing different constructions and experimenting with different materials. We believe this is important because it increases flexibility. We are always trying to understand the industry and to develop.'

But first... 'Later we are meeting people from HP Indigo at a restaurant.'



Etiflex hosted a party for its suppliers on the eve of Labelexpo Mexico 2023

“Previously we had exported less than 1 percent of our production – by late 2022 it had risen to 15 percent”



Etiflex's co-CEOs Sergio Shor (left) and Ari Vonderwalde

Relationships

Etiflex's management has long been familiar faces in the industry, regularly attending trade shows and visiting suppliers, as well as being active in associations and supplier councils. It is the only Mexican company to be a member of US association TLMI.

'We travel a lot,' says co-CEO Ari Vonderwalde. 'We've always attended the Labelexpo shows, as well as IDExpo, Scantech, textile shows and others. We enjoy it, but also we take home knowledge from everywhere we go. This helps to make us stronger, to grow and to be more professional. Our move into RFID label production was the result of one of these many trips.'

'Having close relationships with our suppliers, to be real business partners, is part of our philosophy. It is why we have so many supplier friends – it has become a family.'

Testament to this was the party hosted by Etiflex on the eve of Labelexpo Mexico in April 2023, with 80 suppliers in attendance for factory tours and – of course – plenty of food, music and fun.

Vonderwalde has served on councils for Avery Dennison; Shor was president of AIM Mexico and on the Zebra council. 'We have always tried to be close to the industry,' explains Vonderwalde. 'And to our colleagues too – I don't call them competitors, we are colleagues.'



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Dynamic label market shines in Colombia

Stability, strong economic growth and sustainability flourish in the gateway to Latin America. James Quirk reports

Colombia has a strong claim to be the region's most dynamic label printing market over the past two decades.

A period of political stability and strong economic growth saw foreign direct investment surge in the 2000s and 2010s, while a growing middle class drove a boom in consumer demand. The local label industry sprang to life, with converters – including many recent entrants to the sector, often coming from a background in sheet-fed offset labels or wider-format printing – investing heavily in new technology.

The growth and dynamism of the local market was captured perfectly in 2014 when Label Summit Latin America took place in Colombia for the first time and attracted record visitor numbers to Medellin, beating attendances in the much bigger markets of Mexico and Brazil.

Recent years have matched the experience of many countries in the wake of the pandemic: a surge in growth as economies reopened in 2021; a dip caused by supply chain issues in 2022; and lower-than-expected growth last year as inflation hit consumer demand and excess stock worked its way through the system. Nevertheless, many in the local industry are optimistic of improving market conditions.

Recovery

'The graphic communication industry faced important challenges in 2023,' says Tatiana Duarte, president of Colombian graphic arts association Andigraf. 'Production experienced minor growth compared to the previous year, as was the case in other manufacturing sectors. In this context, it is expected that the first months of 2024 will allow us to resume a path of growth – anticipating a coming year with greater dynamism, especially from the second semester. This aligns with the economic expectations in Colombia and with the Drupa 2023 report, which revealed a recovery in the global graphic arts sector generating positive expectations for the year ahead.'

An important driver in this optimism is an increasing focus on environmental sustainability. 'Many of our affiliated companies have adopted greener practices, reducing their environmental impact and leading the way to a brighter sustainable



The Label Summit returned to Colombia in March

"Many in the local industry are optimistic of improving market conditions in 2024"

future,' says Duarte.

'Yupo is seeing double-digit growth in Colombia,' says Alex Cruz, sales manager for North and South America at the synthetic material manufacturer. 'Within Latin America, it is our second fastest-growing market. The sustainability benefits of in-mold labeling (IML) are the major driver – everyone is looking for more sustainable packaging, including Colombians.'

'IML is growing in the industrial sector, where we are seeing a shift away from direct print or wraparound labels and toward IML for its durability as well as its sustainability. And there is growth in cut and stack labels used in horticulture, which is a very important industry in Colombia.'

Arclad, the Colombia-headquartered self-adhesive material manufacturer, shares the optimism in its local market.

'There was a reduction in demand in Colombia – and across Latin America – in 2023,' says Carolina Jaramillo, Arclad's marketing director. 'Inflation impacted consumer demand and throughout the supply chain, companies began the year with high stock levels, having stockpiled following the shortages during the pandemic. For suppliers like us, there is also increasing competition from Asian manufacturers.'

'But there is a sense of optimism in the market and Colombia has always had a very dynamic label industry. There are lots of small businesses in the country and a strong culture of entrepreneurship. They know that their labels can't just

be the cheapest option: They need to differentiate themselves from the crowd and showcase their innovation. Similarly, companies are paying much more attention to environmental sustainability, and they like the environmental performance of our sustainable materials.'

Jaramillo highlights growth in the private label sector as consumers, faced with high inflation, increasingly switch to cheaper goods to stretch their money further.

Though Mexico has been the primary beneficiary of the post-pandemic nearshoring trend – US companies wanting shorter supply chains which are at less risk of breaking down due to external events – Colombia too is well-placed to take advantage, believes Jaramillo. 'Many of our customers in Colombia export labels to the US. Colombia is strategically located and this can provide more opportunities.'

John Vigna, Latin America sales manager for Mark Andy, says there is a lot of interest in hybrid technology. 'Companies are keen to reduce costs and increase efficiency. There used to be a steadier flow of orders from the country but that has slowed a little recently, and across the Andean region in general – mainly due to politics. Companies are a bit more cautious and are waiting before investing. But that always changes eventually.'



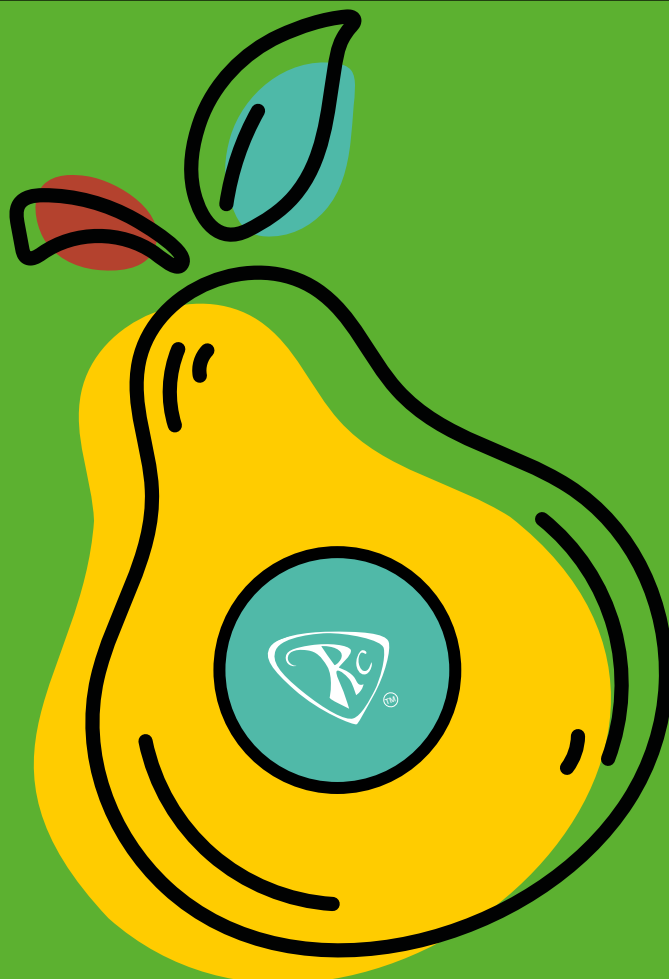

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Digital pouch startup aims to disrupt Moroccan market

With the founding of EZPac, Moroccan brands can now, for the first time, source digitally printed stand-up pouches locally. Andy Thomas-Emans reports

EZPac, a startup digital printing operation, is looking to revolutionize the stand-up pouch market in Morocco following the installation of an HP Indigo 20000 press and pouch manufacturing line.

EZPac was founded by Yassine Cherkaoui with business partner and CFO Mourad Maach in March 2023 after reading about the success of ePac in disrupting the flexible packaging market in other parts of the world.

Behind EZPac lies a long history of print and converting industry expertise. In 1999, Cherkaoui's father was working for the UN Food Organization in Morocco, where he realized there was a local shortage of large bags to transport goods like flour and sugar. To help fill the gap, Cherkaoui senior founded a new company called Amadic to manufacture woven bags.

Yassine Cherkaoui and his brother later took over this operation and diversified into decorated shopping bags and a joint venture to make 1-2 ton bags for the construction industry.

The industrial market proved disappointing, so the brothers focused on branded shopping bags and related products, such as hard-wearing printed tablecloths for the catering market. The laminated non-woven bags are printed on four 4 to 10 color flexo presses.

'Three years ago, the idea came to me that flexo was limiting us,' recalls Cherkaoui. 'In flexo, you need to print big quantities, and the quality is not quite perfect. You can have problems with ink supplies in the local market where the colors are not exact, and you depend on the local plate suppliers. We found all this hard.'

Flexible packaging

After reading about ePac, Cherkaoui wondered if digital printing of shopping bags might also be possible.

'I thought this was the solution for my printing problems,' he says. 'At the same time, I noticed the first few stand-up pouches on the retail shelves - every month a few more. So, I started thinking about the pouch business and studying how it worked in Morocco.'

Cherkaoui discovered that the bigger



L-R: Yassine Cherkaoui, CEO of EZPac; Reda Moukrite, CEO of Redagraph and Mourad Maach, CFO of EZPac with HP Indigo 20000 press

“Short runs, VDP, personalization – this is something you simply cannot do in flexo. We think the big brands will love that”

brands were buying pre-printed pouches from outside Morocco – from Turkey, for example. Smaller brands, which typically sold their products in the local Souk, were buying plain windowed pouches from China and applying self-adhesive labels by hand, a time-consuming and expensive operation.

Cherkaoui then contacted Reda Moukrite at global graphic equipment supplier Redagraph, HP's agent in Morocco.

Recalls Moukrite: 'As soon as Yassine explained his ideas to me, I told him "I believe in this project, and I will help you make it successful". I developed a marketing plan and started contacting brands to onboard them on our project. Creative product marketing is vital. This is why we will offer design help and all the tools brands need to create the best custom packaging for their product.'

Machine investment

Cherkaoui and Maach struck an agreement to buy a refurbished HP Indigo 20000 press, which, unlike second-hand or black-market presses, is fully supported by HP.

Cherkaoui also invested in a pouch-making line, along with a laminator and slitting machine. 'We use hot lamination to make bags in our Amadic

Redagraph history

Redagraph is a 45-year-old company founded by Abdou Moukrite, father of Reda Moukrite. Today, Redagraph is a global supplier of graphic equipment for the newspaper and packaging markets.

Originally established in Casablanca, Morocco, Redagraph has extended its presence into North and West Africa. 'Our main focus is to expand production capacities on the packaging side and help print converters and brands in the agroindustry, pharmaceutical, and cosmetics to manufacture high-value packaging,' says Reda Moukrite.

So far, the most successful installation has been multiple HP digital presses at a tea producer printing tea bags and folding cartons.

Moukrite's next project is to set up a world-class flexo platemaking operation in Morocco in conjunction with Xsys, building on his long experience in the highly automated and digitized world of newspaper preproduction.

factory, but for pouches in the new factory, we use cold lamination. Cold lamination is totally new here and I am learning how to use it.'

Cherkaoui is, without doubt, the most hands-on CEO this writer has come across. He insists on being able to operate every piece of machinery in his factories – including the HP Indigo 20000 press.

'Since I was young, I liked to do things with my hands, and I like to find out how things work,' explains Cherkaoui. 'I learn the machinery myself, and I then teach the operator. This means I understand if something is not being done correctly, and, more importantly, I can understand the limitations and the potential of the machine. For example, the HP 20000 was not designed to handle shopping bags – it has never been used for that before. The press has a 1.12m repeat, but you need a 1.16m repeat for shopping bags. I explained this to the HP engineer, who said it could not be done. But we have worked on this together and now it can.'

Training on the HP Indigo 20000 press did present some obstacles. 'We have challenges in Morocco getting visas to visit HP's demo center in Barcelona. It can take six to seven months just to get a visa appointment. So, HP sent an engineer here to train me and I also train remotely online.'

Products

When L&L visited EZPac, Cherkaoui was digitally printing film for lamination to a non-woven shopping bag. 'This will open up whole new markets for our customers in premium, short-run bags, which they can order in small lots for special occasions such as Ramadan and sporting events like the Africa Cup,' says Cherkaoui. 'The brand owners simply upload their files to us, and our team optimizes the designs for the 20000 press before sending them back to the customer for approval. Short runs, VDP, personalization – this is something you simply cannot do in flexo. We think the big brands will love that.'

While there are existing (and enthusiastic) customers for digitally printed shopping bags, selling printed pouches will present more of a challenge.

Cherkaoui sees three categories of potential buyers.

He says: 'Firstly, there are brands that already source pouches from outside Morocco. This is quite an easy sell, and we are currently working on our first project.'

Secondly are the brands which do not currently use pouches, but usually use printed bags. 'We have to persuade them to invest in packaging machinery, which is not easy. We have to make some development with them.'

Lastly, smaller brands are looking to replace hand-labeled plain pouches. This could be an exciting area for startups looking to differentiate their products.

As a next step, Cherkaoui plans to diversify into both shrink sleeve labels and pressure-sensitive labels printed on the HP Indigo 20000 press, for which he will purchase sleeve converting and off-line die-cutting equipment.

Growth potential

Moukrite is enthusiastic about EZPac's vision and future: 'Why would brands import when the technology is available here?'

It certainly seems to be the right time to shift the market to domestic pouch production. 'The consumer market is booming here, creating a huge demand for packaging. The population is growing, and Moroccans are very demanding in terms of packaging customization. People can see cool products being made in Korea and Japan on social media and say why can't we have that? Especially young people using social media want the smartest products.'

Moukrite says that post-Covid the mindset of brand owners has changed, with marketing departments now involved more and more in packaging development, whereas before, it was just procurement. 'That is why we need to be more creative – to allow



Pouch-making line and laminator

“Yassine plans to diversify into both shrink sleeve labels and pressure-sensitive labels printed on the HP Indigo 20000 press, for which he will purchase sleeve converting and off-line die cutting equipment”

these people to differentiate their products. We have many small new brands which also want to export. This means they are more concerned about having the right colors in the packaging to be able to find their consumers on supermarket shelves. Making the local brands source locally in Morocco will help them to expand.'

All this comes on the back of a significant growth in domestic manufacturing of goods of all kinds and a push to export. 'Now there are many more choices of FMCG products,' says Moukrite. 'When I was young, we used to go outside Morocco to buy chocolates. Morocco has become one of the major agri-food exporters, exceeding 7 billion USD in annual revenue. Packaging has been sourced outside Morocco because people did not find the technology here that can print with the quality common in Europe. That's why buyers go to Turkey, Tunisia or Dubai. We want to bring back these accounts and start producing locally.'

One major hurdle is the conservatism of the wider package print industry. 'Converters offer only what they are able to print, so the change will come from brand owners as they need more and more versatility and flexibility,' says Moukrite. 'Christian Menegon, my old friend at HP Indigo, used to tell me that you have to think about the customer of your customer, and this is how they need to think. So, the question is, how can we get our printers to invest in the equipment that will transform our packaging industry?'

Many developing countries are in the same position as Morocco, with a growing and increasingly demanding consumer class but an outdated printing base that cannot keep up with the latest packaging formats and quality expectations.

'It does take people who are slightly crazy to make this happen – people like my friend Yassine and myself! We are the right people and at the right time.'

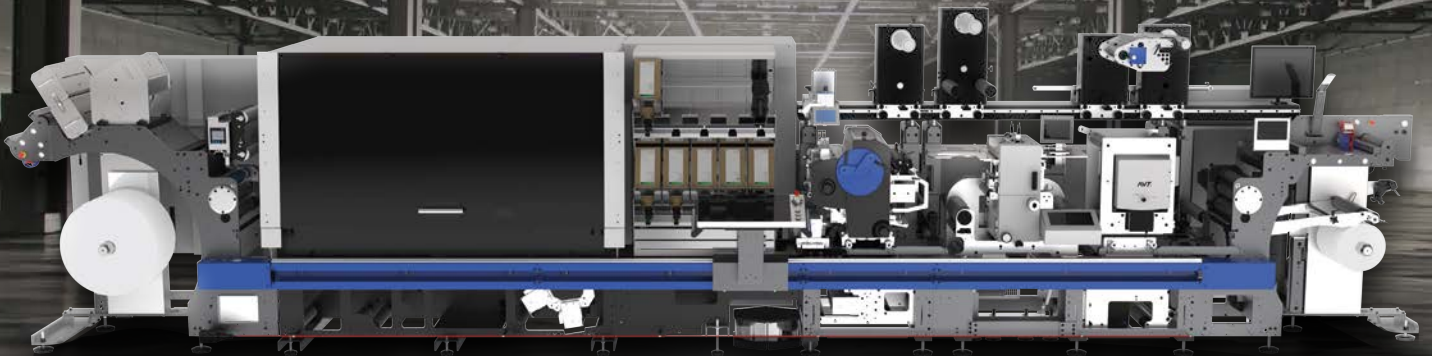


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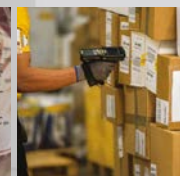
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Holosafe Security Labels combats counterfeiting

Combining the power of flexo with holography, Holosafe Security Labels relies on Nilpeter's FB-Line to battle counterfeiting.
Adyasha Sinha reports

It's not a new problem: Counterfeit products pose a risk for companies. Consider the fake medicines a customer may fail to recognize as an imitation. When not held to the same manufacturing standards as legitimate brands, these imitation products may risk customer health. Not to mention the harmful side effects on the brand's reputation.

The risks are real—but there are solutions, and label manufacturers can be the first line of defense against counterfeits.

Preparing the defense mechanism

One such company that has embarked on the journey to fight counterfeiting is Holosafe Security Labels, based in Greater Noida, India. The company was started in 2008 and offers solutions ranging from anti-counterfeiting, labeling and packaging products to various IT-enabled supply chain management solutions. The company serves various industries such as FMCG, pharmaceutical, beverages, automobile, government and more.

Holosafe believes in constant innovation to develop security printing techniques to not only combat counterfeiting but also enhance the look of the label through aesthetic design. After all, brand protection doesn't have to compromise on print quality or shelf appeal, says Manjula Mishra, the managing director of Holosafe Security Labels.

'Nowadays, buyers are looking for a combination of a security label with beautification, a combination of high-quality printing and print embellishment,' Mishra says. 'We are trying our best to provide beauty with brand security.'

Holosafe is led by Manjula and her husband Pankaj Mishra. Pankaj comes with strong technical acumen and more than 20 years of experience in the label and hologram industry. That's how the idea of Holosafe Security Labels came into being in 2008.

Holosafe combines flexo printing with holographic techniques to provide anti-counterfeit security features.

'We started our business by manufacturing holograms and other holographic products. We saw a lot of scope for printed labels with holography. Hence, we started the printing vertical where both holograms and printing find applications together,' says Manjula.

For the same reason, the company recently installed a Nilpeter FB line 10-color narrow web flexo printing press. The 430mm wide FB line press can print up to 230m/min and combines flexo, gravure, hot foil and cold foil with a die-cutting unit, a specialized conveyor and a stacking system. It can be used for a wide variety of jobs, including pressure-sensitive labels, security labels, shrink sleeves and in-mold labels.

Commenting on the Nilpeter FB line press, Alan Barretto, managing director, Nilpeter India, says, 'It is crucial to ensure that the products are genuine and have not been tampered with, counterfeited, or diverted. Our many label types and brand protection tools help achieve just that – from plastics with exceptional barrier properties, multi-faceted lamination possibilities, RFID inlays, braille and other embossing capabilities.'

Standing out with brand protection

The Nilpeter FB line has several added features such as an automated plate positioning system (APPS), pre-register and



Holosafe Security Labels factory in Greater Noida, India

“Although counterfeiting activities can never be fully stopped, when we do labels, we try to add solutions that can reduce counterfeiting”

re-register functionality and is designed to print value-added labels efficiently and at high speeds. Nilpeter says the machine represents the latest generation of label printing with increased automation, that is easy to use and operator-friendly.

Barretto adds, 'Nilpeter printing presses are tailored to help meet the extensive quality, safety, and product information requirements of pharmaceutical, nutraceutical, healthcare, medical and chemical labels. All while maintaining a high printing quality without compromising design.'

Connecting the dots

Working to serve industries across the country and overseas, Holosafe looked no further than Nilpeter. Manjula says: 'The European giant is the only overseas company which has a manufacturing unit in India.'

Holosafe grew about 15 percent last year and wants to further establish itself as a top label company in India and a provider of security solutions.

'Although counterfeiting activities can never be fully stopped, when we do labels, we try to add solutions that can reduce counterfeiting,' says Manjula.

In addition to the Nilpeter press, Holosafe is equipped with three other fully automatic UV flexo, high-speed printing machines from Multitec. The Multitec equipment is fully loaded, 8-color with online UV coating (gloss, matte, combination) capable of printing a wide range of substrates from paper to a variety of films, and capable of producing special effects like hot foil and cold foil stamping, serial numbering as well as lamination, die-cutting and automatic defect detection.



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Sri Lanka's label printers eye international markets

Despite global economic setbacks, the label printing industry in Sri Lanka has shown remarkable resilience and adaptability.
Adyasha Sinha reports

Sri Lanka, an island country in South Asia known for its natural beauty and tea, has been experiencing a severe financial crisis that has impacted every sector of business, including its label printing industry. The Sri Lankan label industry has faced difficulties purchasing raw materials such as ink and paper, as well as capital equipment — in short, everything needed to run a label printing business.

Despite global economic setbacks, the country's label printing industry has shown resilience and adaptability. Industry players have navigated the challenges and are now positioned for growth, according to discussions at Sri Lanka Print 2023 hosted by the Sri Lanka Association of Printers (SLAP) held jointly with Lankapak 2023.

SLAP president, Anil Kariyawasam, says: 'We are delighted to witness the incredible talent and dedication of the Sri Lanka print community. The quality of printing is of international standards and is a testament to the industry's progress. There is clear evidence of how far we have developed the industry, which today employs over 300,000 people in 4,000 printing facilities across the country.'

Strategic diversification

The Sri Lankan label printing industry is working toward becoming the 'printing hub' of South Asia. Located below India in the Indian Ocean, Sri Lanka's many harbors and proficient air cargo services make it an ideal ground for global exports. Its prime geographical position allows easy access to import raw materials as well as export finished goods in short time frames.

All of that equips the Sri Lankan label industry to participate on the global stage.

Sathis Abeywickrama, CEO of Flexiprint and Print USA, comments: 'My goal is to support value-added Sri Lankan products such as tea, through quality printed offset packaging. With 27 years of experience in the trade, we hold a substantial market share overseas as we supply to Asia Pacific, EU and the Americas. Our customer base also includes prestigious brands from Australia, New Zealand, Papua New Guinea, India, Saudi Arabia, UAE, the UK, the USA and Africa.'

Flexiprint manufactures packaging for tea bags, mainly tea tags and tea envelopes. In

"The quality of printing is of international standards and is a testament to the industry's progress"

recent years, the company has successfully ventured into the self-adhesive label market, printing labels for coconuts, cosmetics, pharmaceuticals, alcoholic beverages and more. Flexiprint, along with Print USA, boasts a steady growth rate of over 10 percent per year.

'Printing had to survive because...like it or not, it is a huge part of our industry,' says Isuru Abeywickrama, director of Flexiprint. 'In times of stress, people drink more tea, whether they are in the office or at home. So, we had to keep on working. During the pandemic, our order booking rose by 28 percent. To the credit of our government, we were given permission to carry on with our work, with all due precautions, including those for the employees.'

Where digital meets conventional

In recent years, Sri Lanka's label printers have embraced technological advancements, integrating modern printing techniques and machinery. This has improved efficiency and positioned them as competitive players in the global market.

During the SLAP event, many exhibitors agreed digital printing showed signs of strong growth, and some expressed a desire for industry training on conventional print.

Sandeep Sharma, director of Acme Rolltech, says: 'The response from the attendees was very positive, with a mix of narrow, wide web, and CI flexo customers expressing interest in the company's products. We see Sri Lanka as a growing market in both wide and narrow web segments but believe that there is still a need for technical education about flexo printing technology.' Acme has several customers in Sri Lanka, and the company has plans to increase its presence in the local market.

However, Flexiprint's Abeywickrama sees the many advantages of conventional



Tea labels and tags are a prime market in Sri Lanka

printing and has invested in a Bobst press that will be installed in April. 'In flexo, you have so many advantages. And the best thing with flexo is you can go water-based and have very quick platemaking time. We have the capacity to print 85 million tea bag labels a day.'

Sustainability initiatives

In addition to the regularly printed exports, the printing industry of Sri Lanka offers an opportunity for eco-friendly products. Many top printers in the industry have adopted sustainability measures to protect the environment, recover raw materials and offer environmentally friendly printing processes at attractive rates while adhering to world-class quality standards.

Abeywickrama adds: 'I am a firm believer that a sustainable business is a successful one and we intend to leave the smallest environmental footprint behind.'

The label printing industry in Sri Lanka is not just surviving but thriving despite challenges. Strategic investments in technology, a skilled workforce and a proactive approach to global markets have positioned Sri Lanka as a key player in the label printing arena. As the industry continues to grow, its ability to adapt to changing market dynamics and embrace sustainability will be critical for sustained success.



To read more about Flexiprint from a past issue of L&L, scan the QR code



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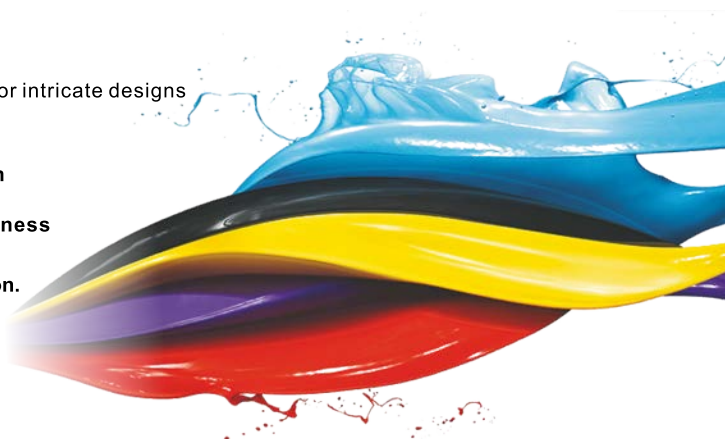
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GPP 2024 brings together dynamic MEA packaging industry

Gulf Print & Pack 2024 offered insight into the vibrant Middle East and African print and packaging market, report Adyasha Sinha and Akanksha Meena

Prominent trends at Gulf Print & Pack 2024 were the replacement of offset with flexo with inline converting, increased uptake of digital printing across both commercial and package print spaces, and automation - particularly in labels, flexible packaging and commercial print applications. The exhibition also placed a spotlight on sustainability.

Amit Radia, CEO and founder of leading print company Atlas Print adds: 'Gulf Print & Pack 2024 was an excellent show. Gulf Print & Pack is the benchmark of the printing industry for the region and a must-attend event on the calendar.'

Labels and flex pack

Labels and flexible packaging suppliers were among the most visited at the show. For the first time, there were multiple narrow web flexo presses on the GPP show floor, and a growing number of narrow web digital presses targeted at label and flexible packaging applications.

Afra International kicked off the show by unveiling the Etirama SPS3 flexo press. This 10-color servo-driven press boasts a 350mm web width. It offers options including cold foil, delam/relam, lamination, sheeter and a turn bar for reverse printing. The machine was displayed in line with a Lundberg waste handling system to collect matrix waste during production.

First-time GPP exhibitor **Nilpeter** took full advantage of the growing interest in flexo and hybrid printing.

Martin Teilberg, global marketing manager at Nilpeter, comments: 'There is a good buzz, a good vibe at the show. Sustainable solutions, digitalization and automation are the key trends now, with customers looking to save money and optimize efficiency, and these are the features we have been highlighting.'

Leading Chinese narrow web press manufacturer **Weigang** displayed an 8-color ZJR-350G inline flexo press and ZX-320 intermittent offset presses.

RK Label Printing Machinery showcased its tower-type flexo press which was sold to a customer in Saudi Arabia.

Vinsak promoted Lombardi flexo presses, Iwasaki intermittent flexo and offset presses and Rotatex new edition offset intermittent and wide-web presses. Vinsak has major plans for the relaunch of the Rotatex brand, which will be covered in a future edition of L&L.

Ranesh Bajaj, director of Vinsak, comments: 'A lot of people are saying that UAE is getting crowded as a market and I tend to agree. Earlier, UAE was supplying into Middle East and Africa and now these countries are building their own capabilities. While it may be tough for UAE converters, for machine suppliers, new markets are opening up. Every country in Africa needs to have local production after Covid and supply chain disruptions which continue even now. Every country in the region is preferring to go local. We see Saudi Arabia as an emerging market. So, this region is picking up very strongly. We also see Oman trying to grow as well.'

Digital technology

Digital printing technology could not be overlooked with a surge in demand for short runs, variable printing and customized packaging.

Epson demonstrated its SurePress L-4733AW water-based digital label press along with its desktop printers ColorWorks



"Gulf Print & Pack 2024 was an excellent show. Gulf Print & Pack is the benchmark of the printing industry for the region and a must-attend event on the calendar"

C6500 and C4000 featuring cloud-enabled, on-demand color label printing.

Pulisi promoted its DPIM 330FUV inkjet press that prints at 60m /min in 1200x600 DPI resolution with maximum width of 330mm. The press can be configured with inline flexo print stations for coating and spot color applications.

Konica Minolta showcased its AccurioLabel 400 digital label press which prints at speeds up to 39.9m/min in CMYK with the option to add white.

Konica Minolta also promoted its AccurioLabel 230 digital press and MGI AccurioShine 3600 digital embellishment press. The company sold five units of its narrow web production machines and two units of AccurioShine 3600 embellishment machine.

Nayyar Ansari, printing group leader, Konica Minolta, says: 'Digital labels are in demand across various segments like packaging, food, fashion, and information in the MENA region. Labels produced with digital technology allows efficient production of short-run jobs, needs less space, has no tooling cost, and is compatible with various substrates.'

Flora displayed its J-330s/450 5-color CMYK+white digital inkjet label press. **Arrow Systems** promoted its ArrowJet presses powered by Memjet's water-based DuraFlex technology.

Bobst promoted its conventional and digital products and service portfolio and showcased inkjet printheads, the core of its inkjet digital technology.

Khaled Joundi, zone business director Middle East, Egypt and Pakistan at Bobst, comments: 'There are several key trends shaping the packaging industry in the MEA market. Sustainability, for example, is a paramount concern with increased demand of

sustainable substrates. So, recyclable, degradable materials with high barrier properties are in demand.

'Connectivity and digitalization are also key trends with integration of smart technology to improve the supply chain vision and product traceability. We are also seeing increased demand for short runs, driven by consumer behavior and preferences. There is also a challenge of shortage of skilled labor. All these key trends are creating a landscape for innovation and growth in the market.'

Xeikon promoted its Lion LX3000 press. With a web width of 330mm, the Xeikon Lion LX3000 is a five-color dry toner press that runs at 42m/min.

Multisystem displayed its desktop CMYK+pure color spot thermal transfer printing and cutting machine for sign and labels and also showed direct-to-pouch printing system Pro3000 series that enables single-pass white under CMYK.

Also demonstrated was the **OKI** Pro9542 direct-to-packaging system. It prints in CMYK plus high density white-under single pass printing. The printer is used by leading FMCG brands such as Toblerone for variable print on pre-printed packaging.

MTex displayed entry-level digital flexible packaging printer, the NS FlexPack 6/10 in 800mm. The printer uses water-based inks and incorporates inline lamination. The company also demonstrated NSAtom2 and NS Cutmaster digital label print-and-cut machines. The systems can print variable data onto pre-cut labels.

Showcasing new technologies for the commercial printing market **Ricoh** demonstrated Ricoh Pro C9500, Ricoh Pro C7500 and Ricoh Auto Color Adjuster. **GCG Kyocera** featured the Taskalfa Pro 15000c color sheet-fed inkjet production printer. **Heidelberg** focused on its Versafire product range for printing banners up to 1,260mm and printing on paper media from 40 to 470g/m2 duplex.

Materials and UV products

The region is seeing demand for sustainable materials and a transition to UV LED-curing inks and non-solvent based adhesives.

Jindal SMI Coated Products promoted its range of sustainable self-adhesive labelstock at the show.

Akash Goyal, business lead – Americas at Jindal SMI, says: 'It has been a good show for us. We saw a lot of footfall coming in since day one. We are seeing landscape that has changed in the last six months being reflected and observed as far as the show is concerned. Earlier the labelstock manufacturers exhibiting at the show were just two or three, now there are more than 12.'

Goyal adds that investment in machines

Challenges in the MEA

While the Middle East printing industry presents numerous opportunities, it also faces several challenges.

Spring Xu, sales manager, Weigang, says, 'Lack of funding is the biggest hurdle to starting a new business in Dubai. The top challenges are access to capital and lack of financial support from banks. Many banks and investors fail to understand the startup business model and the need for long-term investment.

And even when funding is approved, it takes several months for the funds to get credited to the bank account. The fees for business registration and licensing are high.'

Goyal of Jindal SMI adds that non-availability of skilled and technical staff is a challenge in Dubai. 'Additionally, people here have not entered the sustainability zone yet, when the entire world is talking about it.'

“Lack of funding is the biggest hurdle to starting a new business in Dubai. The top challenges are access to capital and lack of financial support from banks”



is also increasing in the region. 'Other than that, we also see Europeans coming into this market and this exhibition, signaling the fact that there can be cross pollination in how business can be operated.'

Harshal Mahajan, sales head – export at Jindal SMI comments that new entrants are being drawn to the local market, observing the achievements of established players who have shaped Dubai's print and converting landscape over the past decade. Now, business growth is extending beyond Dubai to neighboring countries such as Saudi Arabia and Qatar, with Dubai emerging as a hub for African nations, too.

'Another trend we are seeing is focus on brands on sustainable packaging where Jindal SMI plays a major role. We have sustainable films, and films with PCR content. We make our own PET liners and adhesive grades developed for recyclability and wash-off labels.'

Frimpeks promoted UV and water-based inks and coating for flexo, offset and screen printing. **Mondula** presented LED low migration UV adhesive luxbond LM 1200. **Cooluv Technology** showcased two of its UV LED curing systems: SuperCure series for narrow-web applications and UltraCure series for sheet-fed applications.

Bright Ink & Coating promoted its portfolio ranging across UV, water-based, and UV LED and brand protection inks.

Digital finishing and inspection
Printech Middle East represented its

partners including Omet, Eukalin and Prati.

The company's stand featured a 450mm-wide Prati Saturn inspection rewinder equipped with a 100 percent inspection system. Options on the line include laser die-cutting, varnishing, flexo printing and cold-foiling.

Chiara Prati, CEO and CSO at Prati, says: 'The show went very well for us. We saw many visitors not just from the region but also from other countries like Africa, Algeria, Egypt. These days printers focus on low-cost machines, but companies that want to distinguish themselves from others and deliver quality - especially to brand owners - of course, are a big potential market for us. We have more than 100 installations in the Middle East market.'

Vinsak showcased the latest high build varnish system featuring higher speeds and ability to print variable data on holographic foils. Vinsak sold two label presses, six high build label systems, one slitter with semi-automatic turret rewinder and one high speed flatbed die-cutter. Most of the machines were sold in UAE, some went to Africa and one in Saudi Arabia.

Anoop Plastic displayed its Lucid Imaging OptiCheck Label vision inspection system.



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Labelexpo Asia 2023 showcases vibrant Chinese industry

Labelexpo Asia 2023 showcased a vibrant Chinese manufacturing industry along with key international suppliers. Yolanda Wang and Andy Thomas-Emans report

Labelexpo Asia celebrated its 20th anniversary at the SNIIEC exhibition center in Shanghai in December, providing a showcase for the Chinese machine manufacturing industry and introducing new international technology to the country's converters.

Now the second biggest Labelexpo show in the world, Labelexpo Asia boasted a total exhibition area of more than 32,000sqm with more than 380 exhibitors, including over 100 new companies.

Highlights of the show included new launches across digital printing technology, hybrid printing technology, flexo/offset printing technology for label and flexible packaging printing, automatic production processes for pre-press, printing and post-press, as well as sustainable inks, adhesives, self-adhesive materials and RFID.

Digital printing

New digital technology launches were a highlight of this year's exhibition. As well as international suppliers, including HP Indigo, Durst, Konica Minolta and Epson, there were launches from domestic brands, including Weigang, Flora, Pulisi, Label Source, Haotian, KingT, Vorey, General Inkjet and others.

HP not only displayed an HP Indigo 6K and HP Indigo 25K press on site but also demonstrated the new HP Indigo 200K online for the first time in the Chinese market. The HP booth featured selected user case studies across different market segments.

'In addition to digital label and packaging presses, HP has many technologies, such as a complete set of anti-counterfeiting and variable data solutions,' says Roy Xu, HP's Greater China industrial print general manager.

Xu says the HP Indigo 200K digital press is mainly aimed at flexible packaging applications, particularly for label converters looking to diversify into the flexible packaging market.

'Digital printing is not looking to replace the traditional CI flexo packaging market,' adds Xu. 'We have used the technical experience accumulated in the label printing field to expand to the high-potential short-run flexible packaging market.'

Durst demonstrated its Tau 330 RSC E press, the entry-level press to the Tau range with the same print engine imaging at 1,200 x 1,200 DPI. The press comes as standard with CMYK+ high opacity white, but can be upgraded to CMYK+OVG+W. The company also introduced its Hawk Eye automated print quality control system to the China market.

Shares Lynn Pan, deputy general manager of Durst China: 'Durst closed three orders on site, among which the Shandong Golden Realm label company ordered its third Durst digital press. At the last Labelexpo Asia in 2019, the company signed the first Durst digital printing press.' Durst has now sold eight presses in China.

Konica Minolta launched its AccurioLabel 400 toner-based digital label press, now with an additional white station (CMYK+W). The machine prints at up to 39.9m/min with a print resolution of 3,600 x 2,400 DPI. It is fitted with automated color management and the IQ-520 automatic intelligent quality monitoring system. Also on display was the established AccurioLabel 230 4-color digital label press, launched in 2019, which prints at 23.4m/min with 3,600 x 1,200 DPI resolution.

Epson displayed its desktop digital printing technology — including the CW-C6530, CW-C6030, TM-C7520G, TM-C3520 machines — and its two main industrial label printing presses, the SurePress L-4733AW water-based and SurePress L-6534VW UV inkjet press.

Weigang launched its first digital press, the WG S350, which can be supplied as a standalone system or configured as a fully hybrid machine (ZJR S350 Pro) with integrated flexo print units for pre-coating, solid colors and varnishing, including in-line die-cutting.

The color engine of the Weigang WG S350 uses Epson S3200 printheads with a maximum resolution of 1,200 x 600 DPI, reaching speeds up to 55m/min speed at 600 x 600 DPI. The ZJR S350 Pro can be configured with up to 10 colors, typically CMYK+white, varnish and spot colors.

'After years of development, Weigang has become the leading conventional press supplier in China,' says Zhou Xiang, general manager of Weigang. 'This is the first time we have launched digital printing equipment, which is an important area we want to explore in the future.'

Flora launched its J-350 Pro digital press in a 6-channel configuration which includes dual white channels along with CMYK. This supports both pre- and post-white for printing on transparent materials. A digital varnish is also available. The J-350 Pro is upgradable to a fully hybrid configuration with the addition of flexo units for a wide range of applications, including coating, varnishing and laminating.

The Flora J-350 Pro features a new interface with industry 4.0 capabilities allowing for real-time analysis of completed orders, printed area and ink consumption.

Pulisi showed its Aobead DPIM-330F digital press, available in widths from 220mm-520mm. The press can be configured with multiple flexo units before and after the digital print engine, allowing, for example, digital printing onto cold foil. Other modules include lamination, die-cutting, waste stripping and web inspection with defect detection which can be integrated into an MIS. The 8-color digital engine (CMYK+WOGV) can also jet a digital varnish.

The company has now sold 120 presses into 25 overseas markets.

'Since its official release in 2021, there are now 120 units installed in the label printing market,' Olive, general manager of Pulisi tells L&L. 'In addition to domestic users, we also have installations in the US, Russia, Mexico, India, South Korea and Malaysia. Some of them ordered their second or third machine soon after purchasing their first Aobead press.'

Label Source demonstrated its LabStar 330S hybrid UV inkjet press, manufactured in cooperation with HanGlobal. The machine runs at 50m/min in 7 colors at a resolution of 600 DPI. The press can be configured with flexo pre-coating, inkjet varnishing, embossing and hot foil stamping modules, along with cold foil, flexo varnishing and semi-rotary die-cutting.

Haotian announced a strategic collaboration agreement with Xaar at Labelexpo Asia 2023 with the launch of the HTP-220/330 digital label embellishment machine. Incorporating Xaar's 2002 printheads, the HTP-220/330 handles graphics, foil and embossing in a single process.



“Durst closed three orders on site, among which the Shandong Golden Realm label company ordered its third Durst digital press. At the last Labelexpo Asia in 2019, they signed the first Durst digital printing press”



Zeng Baixian, general manager of Haotian, says: 'We're delighted to partner with Xaar. The 2002 printhead provides the reliable performance and versatility our customers need to boost their production efficiency and print quality. We believe this collaboration will contribute significantly to the growth of the label printing industry.'

First-time exhibitor **KingT** launched its L-Press 330s single-pass digital inkjet press, using Fujifilm Samba printheads. The press is available in a 330mm print width with a native resolution of 1,200 x 1,200 DPI, 2pl ink drop and reaching speeds of 80m/min. It can print 95 percent of the Pantone color range.

Vorey showed its Colorjet H3 wide format digital press, using water-based inkjet technology with a print speeds between 10 and 36m/min.

First-time exhibitor **General Inkjet Printing** launched its Label Smart 216s digital press designed for small-format digital printing and personalized full-color inkjet coding. The Label Smart 216S features an integrated Agfa Apogee pre-press workflow system and is suitable for a variety of materials including film, label stock, tube laminates and papers. Maximum print width is 216mm.

Conventional printing

In terms of exhibition area, conventional label printing equipment still dominated Labelexpo Asia.

In the China label printing market, there has been a major shift in the last 10 years from narrow web letterpress to intermittent offset technology, and today those offset manufacturers are diversifying into in-line flexo presses.

Chinese suppliers showing flexo press technology included Weigang, Taiyo, Zonten, Spande, Hongsheng, Label Source, Qianrun, Caisheng, Jingle and Ako. A trend towards the use of fully servo-driven presses with high levels of automation was evident.

Weigang, for example, demonstrated its latest ZJR-350 flexo press, driven by state-of-the-art German servo control technology, with a total of 23 servo motors for an 8-color machine, enabling features including full auto registration.

The press uses lightweight sleeves for the printing plate, leading to faster changeover and more stable print quality. The press is equipped with chilled anvil rolls to handle a wide range of film materials including PET, OPP, CPP and PP.

Taiyo showed its servo-driven in-line STF-340 flexo press, equipped with chill drums to handle materials from 20-300 microns, including PE, PP and PET film and composites and paper-based PS laminates. The press includes rail-mounted cold stamping and laminating units, a turnbar and rotary screen unit. The machine can also be equipped with rotary die-cut unit, sheet cut unit, backside slitting, folding unit and online inkjet printer.

Spande showed its S5 series flexo press for the first time, designed to produce labels and unsupported films. Each print unit has independently driven plate cylinder, anvil roller and anilox roller and the press has a servo-driven closed loop tension control system.

'We launched our S7 series flexo press in 2019, now updated to the fifth-generation version, but the S7 platform can no longer meet the needs of this growing market,' says Spande general manager Ye Keqin. 'Therefore we have upgraded the platform to the S5 series flexo press.'

Also exhibited was the AC 700/800 mid-web in-line flexo press. The 8-color press incorporated a **Pantec** hot foil stamping unit capable of foiling shrink sleeve labels – a first in this market.

Zonten launched its modular Smart 420/560/680 press system, printing at up to 150m/min. The machine is platform-based and each unit can be changed between offset, flexo, screen, gravure, varnish and lamination. The cold foil unit can be moved to any position on the press via a rail mount. The machine is servo-driven, equipped with automatic registration and pre-registration systems,



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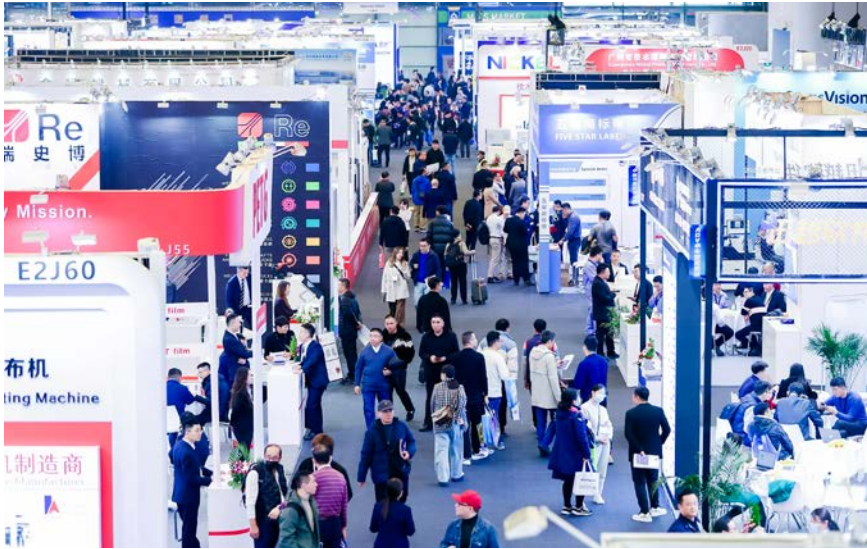
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“This is the first time we have launched digital printing equipment, which is an important area we want to explore in the future”

second pass sensor and turn bar. The substrate range is from 0.04 to 0.35mm, with chilled anvil rolls to increase the range of materials from unsupported film and metallic foil, PS labels and flex pack.

Zonten also demonstrated its ZTR-330/430/560/680 UV flexo press using Rexroth servo control drives throughout. The press has chilled rollers for printing unsupported film and is equipped with corona, double-sided web cleaning and BST inspection system.

Hongsheng showed the HSR-340, the company's latest in-line flexo press, available in widths from 340mm to 650mm with a maximum speed of up to 200m/min. A wide range of materials including 12-micron PET, PVC, BOPP, aluminum, paper and paperboard material can be handled.

Hontec showcased its new FlexiCon 8-color in-line flexo press, specifically designed for printing on shrink sleeves as well as standard label materials. The machine is fully servo-driven and CE-certified and has additional options including cold-foil, hot-stamping, re-lam/de-lam and turn bars.

Label Source demonstrated the YTP-F6 fully servo-driven in-line flexo press with automatic pre-registration and running register control. The press includes in-line non-stop unwinding and rewinding to save waste and improve productivity.

Qianrun presented the Dowell SF370 flexo press, which has been newly upgraded and optimized. Jingle exhibited their JZ-370A flex press, which is suitable for paper and film (PET, OPP, CPP, PP).

Intermittent offset

Another key trend in the conventional press market was the continued development of intermittent offset printing technology.

Wanjie launched its WJPS-450 shaftless offset press which can be switched between intermittent and full rotary modes. Each print unit consists of 11 servo motors which makes ink delivery and materials handling smoother and more accurate compared to shaft-driven technology. Each printing unit has a chill drum that allows a wide range of film and heat-sensitive materials to be run.

In full rotary mode, the press runs at speeds up to 200m/min for longer run work. In intermittent mode, one set of print cylinders is sufficient to run any job format. This method is the best choice for small and medium-sized orders. The press can also be configured with flexo, screen printing, gravure, hot stamping, cold stamping and variable information modules.

Zonten showed its ZTJ-330/520/680 servo-driven intermittent offset press complete with auto and pre-register, with a total of 23 inking rollers per unit, including four plate inking rollers.

Labelmaster launched its LM350 intermittent UV-offset press, which can optionally be configured with a flexo varnish station, inspection, cold foiling, rotary die-cutting, waste rewinding and slitting.

Nickel showed its FS350/520 intermittent offset press, controlled by an American Lattice control system with 19 ink rollers including four plate inking rollers and four water rollers, which effectively prevents ghosting. Each printing unit is

equipped with an independent registration system.

Materials

For materials exhibitors, sustainability was a key theme. **Avery Dennison**, for example, set up a sustainability area on its booth to showcase a new carbon footprint measurement tools and materials that allow packaging to be recycled or reused. The company also demonstrated rPP and rPE facestocks containing 30 percent post-consumer recycled material and rPET facestocks containing 100 percent recycled resin.

Fedrigoni showed Re-Play, a new range of self-adhesive materials manufactured using upcycled siliconized liner waste. The first of these products are four white papers with 10 percent glassine content, available in natural, embossed, pearl and neck label versions. All papers carry a certificate specifying their composition and their value as a recycled and sustainable product.

Re-Play's final carbon footprint is claimed half that of a virgin paper-based product with the same performance features. This is a genuine revolution, a tangible example of upcycling, where the final material has a higher value than the original material.

As the sponsor of the floorplan map, **Yupo** showcased in-mold materials including PET IML material, 3D materials and high-end metalized IML materials. Yupo also showcased its sustainability efforts, including synthetic paper using biomass resins which effectively reduce greenhouse gas (CO₂) emissions.

Lintec demonstrated its polyester-based adhesives, which means that PET containers decorated with PET labels and this new adhesive are effectively mono-material packaging that can be recycled without having to remove the label or adhesive. This product won the Innovation Category (over 300 employees) in the Label Industry Global Awards 2023 presented at Labelexpo Europe.

Jinda claims to be China's biggest domestic manufacturer of pressure-sensitive labels with four coating facilities. The company was focusing on sustainability, now using up to 50 percent PCR materials in its film labelstocks. The company says the recyclate is certified to European standards. Key trends seen by Jinda include an increasing use of PS film and a rapid increase in the number of automated applicators at end users. The company also has a linerless label product for the logistics industry under development.

Another major materials trend at Labelexpo Asia 2023 was intelligent label technology displayed in the Smart Label Trail special show feature.

The rapid development of the Internet

of Things (IoT), intelligent manufacturing and new self-checkout retail formats has driven an increasing demand for UHF (ultra-high frequency) RFID labels. The Smart Label Trail gave converters an overall insight into RFID technology trends and practical applications and how to set up their own RFID converting operation.

A range of suppliers exhibited on the Smart Label Trail, including Avery Dennison, Muehlbauer, Voyantic, Yuanmingjie, Hadesheng, Chili, Taibao, HOACO, Shanghai Jinglu, Chankey, XGSun, OSRFID, ADA, Postek, Leidan, Summation Solutions, HWA-TECH, Wing Singa and Sdiot.

They demonstrated products, technologies, and services related to the entire process of RFID label manufacturing, including cutting-edge chip technology, smart label materials, smart label converting equipment, inspection and QA systems and desktop printing/programming equipment.

At the same time, the RFID Smart Label and Anti-counterfeiting Traceability Innovation Forum was held with China's Security Identification Union (SID), further focusing attention on the development and application of smart labels.

Finishing technology

The trend to digitization in the labels industry is not only happening in the printing industry but also in the finishing process. Labelexpo Asia 2023 saw the introduction of a wide range of laser die-cutting technology.

SEI Laser introduced the latest version of its Labelmaster converting system, available in roll widths of 350mm and 600mm.

This is a fully modular system suitable for roll-to-roll and roll-to-sheet converting, laser die-cutting and finishing. The machine has a wide range of applications including the production of self-adhesive labels and flexible packaging. QR/barcode reading systems allow instant change between jobs, eliminating setup time.

This fourth-generation Labelmaster is equipped with a KyoJet digital printer system and four laser heads, giving a maximum speed of up to 100m/min dependent on cutting pattern, in some cases matching the productivity of traditional die-cutting and finishing systems.

Golden Laser showed its LC350 intelligent high-speed laser die-cutting machine, which adopts multi-head laser technology and can reach speeds up to 120m/min depending on material and cutting pattern.

Shengye displayed its SR360 roll-to-roll laser die-cutting machine with a beam diameter down to 0.2mm, while Jingwei debuted its RSF-360 laser die-cutting machine, capable of operating at up to 60m/min.

Digital embellishment is a growing application in the China market, and systems were demonstrated by a range of suppliers.

Kurz showed its digital transfer metallization systems. The company supplies complete packages including digital machine modules, transfer coatings, customized inks and efficiency-boosting software.

Brotech showed its iDM 330 digital embellishment system, a multifunctional machine that supports the application of high opacity digital white, digital metallization and digital varnish. The machine can handle variable data, 2D barcodes, and braille.

Brotech also launched its SDF Hybrid 370 converter in the Asia-Pacific region.

This is a platform-based system that incorporates a rotatable hot foil unit which can be switched between horizontal and vertical foil stamping directions with a maximum pressure of up to 45 tons.

The system at the show also incorporated a flatbed screen and a flexo unit. Both laser and conventional die-cutting modules can be selected, and there is a rail mounting system for additional processing.



“We believe this collaboration will contribute significantly to the growth of the label printing industry”

The SDF PLUS can also be customized with a digital embellishment unit, including digital white ink and digital foil stamping.

This was the first demonstration of equipment resulting from the acquisition of France-based Smag by **Rhyguan**. On display was a range of equipment including the Plus-330 line designed to finish digitally printed labels with high-quality embellishments including digital foil and high build digital varnish. It is suitable for ultra short-run jobs, personalized labels and high-end security applications.

Reborn showed its 370mm-wide RJB-Remix 3DW UV digital embellishment equipment operating at speeds up to 50m/min. The Remix utilizes Ricoh G5 inkjet heads configured in two rows of six heads to jet both varnish and adhesive for digital foil applications.

Sapa demonstrated its DMS-W and DMS-S digital foil machines. The DMS-W operates in roll-to-roll mode at up to 50m/min on a 330-1050mm width, while the DMS-S operates in single sheet mode at up to 3,000 sheets/hour speed and 390-1050mm width.

Along with the digital embellishment systems was a wide range of conventional die-cutting/slitting/inspection machines.

Vorey displayed its VD3350II Max, an intelligent high-speed label die-cutting machine with dual stations and 12 slitting blades achieving a fast job change in 10 seconds and with a cutting speed of 18m/m.

Reborn demonstrated its RBJ-Azure 370 multi-function finishing machine, including semi-rotary flexo printing, screen printing, flatbed hot stamping/embossing and rotary die cutting. The modular design allows converters to match the system to their converting requirements.

Darui showed its S4 digital die-cutting machine, with eight slitting blades which can be easily configured to run inline with a digital press, and Koyo displayed its digitally controlled cutting machine.

Luster Light Tech demonstrated its Labelhero Series inspection system designed to support critical applications including variable code inspection, color monitoring and PDF proofing. It can integrate with different types of production workflows.

The company is investing significant resources in AI development for the next generation of inspection systems at its impressive new R&D facility.

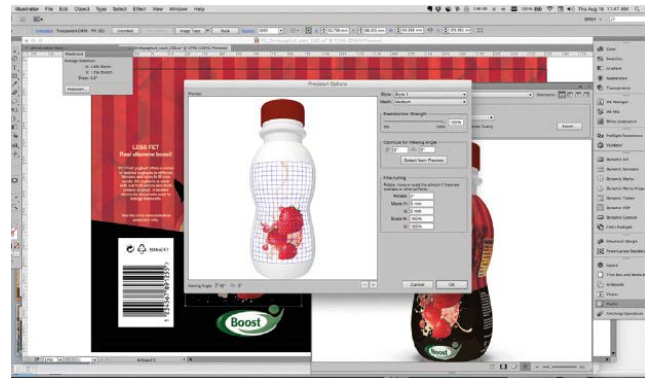


For more information on the Chinese label market, read our Market Focus article on page 95

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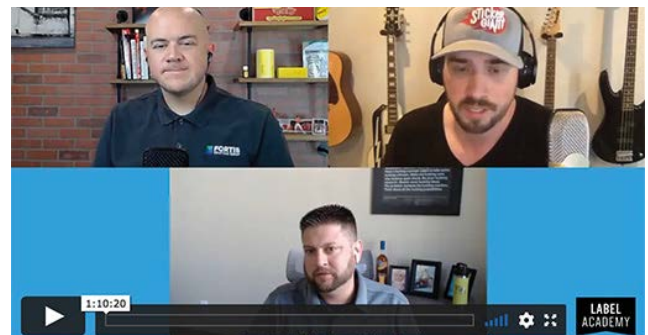
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LINERLESS IS MORE: EMBRACING A LINERLESS LABEL FUTURE

From reducing waste and environmental impact to streamlining labeling processes, linerless labels are reshaping the landscape of packaging and labeling. Akanksha Meena and Andy Thomas-Emans report



Among the most common linerless point-of-sale applications today are in fast food restaurants

In a 2020 article for Labels & Labeling, Mike Fairley reported some stark figures: less than five percent of the 60 billion square meters of global production of laminates with silicone liners were being reused or recycled. Additionally, label converters typically waste five to 10 percent of the original laminate during production and handling.

Further, in some countries, the silicone liner is already being taxed as packaging material and it is becoming ever more complicated and costly to dispose of after usage.

The rising concern about liner waste has driven the development and adoption of linerless labels, particularly in the logistics and retail sectors. Wayne Middleton, senior linerless segment lead at Avery Dennison's Label and Packaging Materials EMENA, says: 'Growth rates for linerless labels are increasingly well into double figures as we look forward, driven by greater awareness of the need to improve the sustainability of the industry and with on-going technical advancements. As the number and type of applications increase, the experience level grows, bringing new levels of innovation and capability. Demand will increase, driving us to a linerless future.'

In its latest Awareness Report, global consultancy Alexander Watson Associates (AWA) forecasts an 18.4 percent CAGR growth for linerless labels between 2022 and 2025.

LINERLESS ADVANTAGE

Traditional self-adhesive labels come with a backing material known as a release liner, which is discarded after the label is applied to a product or package. Eradicating the backing, which typically ends up as landfill waste, is an immediate win.

'Linerless labels also eliminate approximately one-third of material use, generate less waste, increase uptime and reduce the need for roll changes,' says Andoni Rodriguez, business segment director of logistics, retail, office and linerless at UPM Raflatac. 'Linerless

UPM RAFLATAC INVESTS IN LINERLESS COATING

UPM Raflatac has invested 13 million EUR in a new linerless coating line in Nowa Wieś, Poland, to increase its direct thermal linerless annual production capacity by 100 million sqm.

UPM Raflatac says its OptiCut linerless technology combines excellent adhesion with minimal adhesive build-up on cutting knives and platen rollers, ensuring clean printers and uninterrupted application lines.

"GROWTH RATES FOR LINERLESS LABELS ARE INCREASINGLY WELL INTO DOUBLE FIGURES, DRIVEN BY GREATER AWARENESS OF THE NEED TO IMPROVE THE SUSTAINABILITY OF THE INDUSTRY AND WITH ONGOING TECHNICAL ADVANCEMENTS"

labels can be cut to any length, lowering material costs by reducing the need to stock a variety of label materials, thus consolidating stock-keeping units.'

Adds Jay Kim, managing director, Bixelon Europe: 'Essentially, the printer cuts the label to the length required based on the amount of print – so a label for a coffee cup, for example, will be smaller than one for complex, multi-item food delivery order. The result is optimized use of label rolls, with minimal waste.'

Middleton adds that there is also the potential for elimination of the waste matrix produced when die-cutting labels, along with waste reduction by diverting liner from landfills or incineration.

'The reduction in materials needed to supply the same number of labels can be significant,' says Kim. 'This directly relates to a reduction in carbon footprint and water usage. Coupled with the ability to introduce recycled content into the label face materials and industry-wide initiatives such as liner collection schemes for recycling, there are several layers of sustainability improvement – reduce, reuse and recycle.'

Beontag's variable information printing (VIP) linerless label has demonstrated a 35 percent lower carbon footprint and a 33 percent reduction in water consumption compared to a product with the liner in the same application, with benefits at every stage of its life cycle.

Barbara Dunin, director of marketing and ESG at Beontag, states: 'By eliminating the need for a liner, it achieves a significant 38 percent reduction in post-consumer waste during the end-of-life phase, based on the weight of post-consumer waste per square meter. Furthermore, this can aid in complying with environmental directives and support waste-reduction efforts.'

The benefits of Beontag's linerless labels are measured from a cradle-to-grave comparative Life Cycle Assessment (LCA) adhered to ISO 14040 and ISO 14044 standards and certified through a rigorous third-party verification for the Type III Environmental Product Declaration (EPD) issued in compliance with ISO 14025.

ETI has a long history of building machines that allow converters to manufacture linerless labels in-house. Maxime Bayzelon, president at ETI, says in-house production can enhance the sustainability profile of linerless labels.

'When a label printer/converter manufactures linerless labels from A to Z, that is, by coating in-house, the inline manufacturing process plays a pivotal role in minimizing material usage,' states Bayzelon. 'The printer/converter will carefully choose the raw materials (paper or film, silicone and adhesive), selecting those that meet the specific needs of its client and the final end-use application. For example, if a specific coating weight of adhesive is sufficient for an application, we will not use/consume more than necessary.'

'The essence lies in crafting precise formulations tailored for each specific application, resulting in optimal performance and quality. This approach also ensures that we use exactly what is needed, preventing unnecessary waste.'

INDUSTRIAL AND RETAIL APPLICATIONS

Mobile linerless printers are being used by progressive retailers to enable shop floor staff to take label printers with them to shelves or products that need pricing or label updates.

'This option is also more eco-friendly as backings often take up more space on reels and also generally require their own bins in order to be recycled,' says Bixelon's Kim.

In warehouses, label printing stations are typically tied to strategic locations. This setup, while effective, creates operational processes centered around the printer's location. Staff often bring parcels to printing stations, where labels with backing liners are printed and applied to goods. Disposing of these liners becomes an additional challenge, requiring proper disposal in extra bins. These bins take up space and liners can end up on the floor by accident, causing health and safety slip hazards. This becomes important to review across the supply chain, too.

'Especially when you consider some e-commerce retailers are shipping hundreds or thousands of goods daily, and many last mile delivery and shipping operators – like DHL, UPS and FedEx – are responsible for managing and delivering even higher volumes of goods than that,' Kim states.

Shelf label is another scenario within warehouses and fulfillment centers ripe for improvement. Labels on shelves need to be changed quickly within warehouses. Through peak or any important seasonal period label changes might happen more

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Gressingham Foods has switched to linerless labels for its cooked duck range

RAVENWOOD DRIVES LINERLESS INTO FOOD TRAY SECTOR

One company that has been highly successful with its linerless technology is Ravenwood Packaging, which has developed a solution for the cooked food tray sector as an alternative to cardboard sleeves.

The Ravenwood technology provides a semi-adhesive label format that partially adheres to a food tray pack with minimal use of adhesive.

UK-based Coveris Group recently partnered with Ravenwood and made a 1.5 million GBP investment in a dedicated linerless production facility. One of the brands benefitting from this investment is UK-based Gressingham Foods, which has adopted the company's 'linerless envelope' format for its cooked duck range. The linerless labels replace the brand's previous labor-intensive three-tier packaging process which involved hand-applying cardboard sleeves to every pack as well as in some cases a promotional label.

Rebecca Alderton, brand manager at Gressingham Foods, says: 'As one of the only independent brands in the meat, fish and poultry aisle, we needed the linerless labels to mimic the appearance of the sleeve packaging as much as possible in order to retain our brand recognition and shelf appeal, whilst proving that more eco-friendly packaging changes can be achieved in the sector.'

The packaging refresh has streamlined operations and resulted in an annual carbon emission saving of 3,400 CO₂ in kg per year as well as saving 24 tons of material a year.

Coveris is now looking to push its linerless technology into new end-use segments.

"THE RAPID GROWTH IN FOOD TRAY APPLICATIONS AND E-COMMERCE/LOGISTICS LABELS HAS FUELED MUCH GREATER INTEREST AND FURTHER TECHNOLOGICAL ADVANCEMENTS"

frequently as products move around the warehouse or if a label codes or pricing changes. Traditionally, staff would have printed labels at a stationary printing station and then would walk to each appropriate shelf and change the label – a time-consuming process. They'd have to first print the labels, then change them and then dispose of the liners. Again, more waste containers are needed, and liners can end up on the floor. This is a clear use case for mobile linerless printers.

In an example of how powerful mobile linerless technology can be, Galeries Lafayette in France recently launched an in-store 'click and collect' service that uses Bixolon linerless mobile receipt printers, scanners and networking software to identify products for later customer pick-up. The retailer rolled out the e-reservation and 'click and collect' service across its entire Galeries Lafayette and BHV Marais network of 60 stores in one month.

'As we continue to develop and bring in new innovative linerless products, we are seeing a shift in not just linerless technology requirements, but also the connectivity required within the printers with a growing demand for Wi-Fi options across our mobile and stationary linerless ranges,' Kim explains.

Adds UPM's Rodriguez, 'The collaborative development of printers and materials is fostering efficiency, waste reduction and sustainability, collectively delivering enhanced value for end users.'

POINT OF SALE APPLICATIONS

An average consumer will encounter linerless labels at many points in daily life. The most common linerless point-of-sale applications today are in fast food restaurants, and these are increasing at an exponential rate according to UPM's Rodriguez: 'Linerless labels are versatile, as they function in a similar way to a receipt, however, their length can vary based on the consumer's order. In addition, linerless printers are easy to operate and due to their compact size, they fit easily in the kitchen, while also playing a significant role in digitalized smart kitchen concepts.'

Another very common place for the use of direct thermal linerless printing is in supermarkets and grocery stores where it is used alongside weighing scales in deli, meat and produce departments.

These labels are also ideal for industrial food packaging applications

and for labeling product packaging with ingredients and other required nutritional or other information, such as alternative language versions. While the amount and content of the information may vary between packages, the label roll itself stays the same, enabling efficiency gains to be made on packaging lines by avoiding the need for reel changes alongside material usage savings.

Bixolon's Kim says that over the past 10 years mobile linerless label and receipt printers have increasingly played a powerful supporting role in retail, restaurant and food and beverage scenarios. These printers can be integrated into existing business processes, alongside compatible software and mobile devices.

'For example, in retail, POS is combined with label printers to print labels and communicate prices clearly to customers,' says Kim. 'Receipts can be printed too from the same printers and serve as legal proof that goods or services have been purchased. This mobility is enabling the printing of receipts with linerless labels to take place at the point of sale or elsewhere where labels are needed.'

Avery Dennison's Middleton points out that decorating linerless labels is very much an underexplored market opportunity for a wide range of market segments from wines and spirits, home and personal care to food and beverage.

'Direct thermal labels can be pre-printed with colors or eye-catching elements, such as logos if the end user desires a more visually appealing or noticeable label. This flexibility allows for customization while maintaining variable information capability, comments Middleton.

DECORATIVE LINERLESS LABELS

While linerless labels are now well established in the industrial, warehousing, point of sale and retail environments, the technology has taken longer to establish itself in the prime label decoration market.

Ritrama, for example – now part of the Fedrigoni Group – launched its Core linerless technology over five years ago, and since then has only been one major adoption, by SAB Brewery.

The Core system requires a special converter unit, supplied by Omet, and a dedicated applicator supplied by Italian manufacturer Ilti. The label converter prints using its existing equipment, roll-to-roll, in the usual way, on a laminate with a special

“WE ARE SEEING A SHIFT IN LINERLESS TECHNOLOGY REQUIREMENTS, AND THE CONNECTIVITY REQUIRED WITHIN THE PRINTERS WITH A GROWING DEMAND FOR WI-FI OPTIONS ACROSS OUR MOBILE AND STATIONARY LINERLESS RANGES”

liner. The liner is converted to become the silicone layer over the print on the Omet converter.

Despite the many sustainability and process advantages laid out above, there still appears to be some reluctance of brands to adopt these kinds of decorative linerless systems.

There are some key issues for brand owners preventing the widespread adoption of decorative linerless labels.

Firstly, it requires a dedicated applicator, which means swapping out or running alongside well-established high-speed PS label applicator lines. Secondly, there are limitations on label shape – it can only be square or rectangular, which can be an issue for brands that rely on bespoke die-cut shapes.

Additionally, linerless labels typically use release coatings which are applied over the print, and this may limit the degree of embellishment possible or the ability to apply secondary variable information by traditional means such as thermal transfer. Other techniques such as direct thermal or laser printing may provide a solution.

Avery Dennison is the latest company to enter the decorative linerless arena with a mission statement to finally make linerless work in the prime label market.

The company used Labelexpo Europe 2023 to launch its AD LinrSave technology, which is based on the Catchpoint IP developed by entrepreneur Mike Cooper.

Avery Dennison has been working with a range of suppliers to optimize each aspect of the technology including an inline silicone coating station that sits on any flexo press and the key micro-perforating technology which allows the label to easily and cleanly separate on the applicator.

For the label converter, the laminate is printed in the usual way, after which the liner is delaminated and the roll is silicone coated, perforated and slit. Avery Dennison then collects the liner from the converter as part of its standard logistics and recycling network. For the end user, the technology is totally linerless.

Avery Dennison is also working on developing kits that can convert a standard lined PS label applicator to a linerless applicator. Applicator trials are ongoing.

Comments Avery Dennison's Wayne Middleton, 'Linerless label technology has been around for a long time, however, the rapid growth in food tray applications and variable information printing for e-commerce/logistics labels over the last few years has fueled much greater interest and further technological advancements. New developments in decorative linerless conversion and application allow these benefits to be transferred to a wider range of market segments.

'The ability to use existing converting equipment and modified applicators will further drive development. Avery Dennison sees linerless labeling as a key part of the future and is therefore a key strategic platform within the company. Variable information linerless was already part of our portfolio and we are rapidly adding decorative possibilities to the evolutionary journey.

We've also worked and done projects with suppliers of linerless labeling equipment and consumables, and we've had great success. By working in partnership, we can develop solutions that work for all stakeholders.'



Coveris Group partnered with Ravenwood on a dedicated linerless production facility

TECHNOLOGY COMPONENTS

Despite sharing common components with traditional labels, such as the face, adhesive and silicone, linerless labels must possess specific qualities to achieve efficient operation. These include an adhesive that makes the label easy to cut and that prevents accumulation on platen rollers, ensuring the longevity of the cutter's sharpness and prolonged lifespan and reduced maintenance needs. Furthermore, it is important that paper does not generate dust to avoid contaminating the printer.

Both paper-based and filmic materials can be used for linerless labels, depending on the application, the performance criteria necessary and the end-of-life requirements. According to Avery Dennison's Wayne Middleton: 'Paper is often the most suitable for cardboard package labeling, whereas filmic materials, such as PP, offer excellent conversion capability and compatibility with a range of plastic containers and their recycling needs (for instance linerless labels with AD CleanFlake Technology.) The goal is to ensure that current widely available materials can be used in a linerless format to minimize the need for requalification by the end users. Not all papers and not all films will offer the same level of conversion performance, so materials need to be selected according to the application technology being used. For variable information linerless labels, typically, thermal papers come in different varieties, for instance with or without top coatings.'



Linerless label material



Scan the QR code to read more on decorative linerless labels



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Holyrood Distillery's texture-rich labels

From the height of Arthur's Seat to the depths of the Scottish seas, The Touch Agency designs Holyrood Distillery's spirits labels, blending design and textures with Edinburgh's brewing heritage. Akanksha Meena reports

Located in the oldest quarter of Edinburgh, Scotland, Holyrood Distillery has a special connection to the city's iconic volcanic hill. It has been strategically situated at the hill's base, as the city circles around this prominent landmark full of history and cultural importance.

The Touch Agency crafted the brand's product identities that align seamlessly with its significance and offerings.

Height of Arrows

Gin is a vast and competitive market. To stand out in this category, Chris Logan, designer at The Touch Agency and his team took inspiration from the rich distilling history of Edinburgh.

The Distillery sits in the shadow of the mountain Arthur's Seat, which stands 251 meters above Edinburgh's old town.

The Gaelic name for the hill is 'Àrd-Na-Said', which translates to 'Height of Arrows' as the mountain was believed to be the furthest distance any archer could shoot an arrow.

This idea struck a chord with the brand, mirroring the founders' hard work and determination to excel in whisky brewing. Logan's design identity for the Height of Arrows gin incorporates a slight angle on the bottom of the 'H,' which mirrors the angle an arrow needs to be fired to reach the top of Arthur's Seat.

Holyrood's gin is infused with just three ingredients: juniper, beeswax and sea salt.

The simple recipe inspires a clean and uncomplicated label design instead of the heavily ornate and intricate approaches in many gin labels.

It was also crucial to translate the drink's textures into labels. Logan and his team photographed the mountain to give the flavor of the place that inspires the brand. The rock also has geological

"We wanted a label converter who had the same attention to detail, who would focus on that quality. Thankfully, with Scotland's rich whisky industry, several label makers could deliver our vision"

significance with its interesting formations.

Explains Martin Naylor, owner of The Touch Agency: 'Texture is a key part of the brand's production technique. It's all about texture, which needs to be integrated into the product's labeling. We tried to mirror the way Holyrood makes gin or spirits. It's to try and get that texture.'

To achieve this effect, the label was produced using five or six processes, but without making it feel complicated.

'It is still minimal,' says Logan. 'But it has little tactile details, which work nicely. The bottle is quite nice. It is a standard bottle with two finger points on the side so that you can clutch it. We are working on bespoke glass for the next phase, which is very exciting.'

New Make spirit

Another product from Holyrood is the New Make spirit, which needs to be aged before it can become a whisky.

Each of the brand's New Make spirits uses different ingredients not commonly seen in modern distilling, including heritage barley,



Height of Arrow gin by Holyrood Distillery



The 'New Make' brand name on the label is cut in half from top and bottom to replicate the barrel of whisky split in half

specialty malts and a diverse range of yeast strains.

New Make is a more extensive project because the range comprises 20-25 varieties. Unusually, the ingredient details are on the front label.

'Whisky connoisseurs like to know everything about what's in it, how long it's been distilled, the ABV and the percentages of what goes into it. Which is why all the details are right up in the center of this label,' Logan adds.

Logan replicated the image of a whisky barrel with its top taken off through intelligent typography.

The New Make name on the label is cut in half from the top and bottom to replicate the barrel split in half. The label shows the product details, including fermentation time, malts used, and product series name, with a comment on the product from the distillery manager.

The designers used colors to differentiate 20 whiskies in the range. This label incorporates textured special effects, achieved with high-build UV varnish.

Charmed Circle

The Distillery is located close to Charmed Circle, a district of Edinburgh with a water source supporting several breweries.

To create Charmed Circle, the brand creates a New Make Spirit using special heritage barley.

However, instead of placing it into barrels for aging, it blends it with neutral grain spirit and water. This process intensifies the barley's natural flavors and unveils its unique character. The resulting spirit is reminiscent of vodka with sweet and creamy malted barley flavors.

The label is simple in design and ties together the notion of the Charmed Circle with the product name in the center of the circular emblem.

The label also carries a narrative about the historical significance of the brewing process and the geographical location.

The Touch Agency chose a typical beer paper for this label to tie back to the beer brewing history of the circle. The text on the label is debossed for texture – a common thread that runs through all of Holyrood's label designs.

'Throughout all the products, there is an idea of texture and that Holyrood makes all its products with a whiskey maker's mind. So, we have tried to create texture in the pattern or the debossing with foil blocking on the label,' Naylor adds.

Elizabeth Yard

Located just outside of Edinburgh, Elizabeth Yard is an old naval base dating back to World War I, which serves as the inspiration for Holyrood's Elizabeth Yard rum label design. Logan and the team referenced the captivating 'dazzle' patterns used to camouflage naval ships during the war.

In contrast to the typical gray or monochrome appearance of naval vessels, these patterns come together on the labels as vibrant geometric forms with foiling and colors.

Elizabeth Yard port was used for transporting and storing goods during the war. Holyrood's whisky warehouse was once a naval rum store, so naturally, the brand stocks its sherry and bourbon octaves there.

The designers switched colors and information on the label to differentiate between product varieties.

The short-run labels were printed using flexo presses in Edinburgh.

'We wanted a label converter who had the same attention to detail, who would focus on that quality. Thankfully, with Scotland's rich whisky industry, several label makers could deliver our vision. They're expensive labels and are well produced, but the audience in this market demands quality,' Naylor concludes.



The label ties together the notion of the Charmed Circle with the product name in the center of the circular emblem

"Whisky connoisseurs like to know everything about what's in it, how long it's been distilled, the ABV and the percentages of what goes into it. Which is why all the details are right up in the center of this label"



The 'dazzle' patterns on the Elizabeth Yard label come together in a vibrant geometric pattern with foiling and colors



To learn more about Holyrood Distillery, scan the QR code





Joe Montana – Joe Montana limited whisky packaging uses Avery Dennison's NFC tag, enabling an interactive customer experience

Joe Montana launches limited edition whisky with interactive packaging

The football legend partners with Gold Bar Whiskey to launch a limited-edition collection

Renowned football player Joe Montana has launched a limited-edition whisky range in a new partnership with The Gold Bar Spirits Company, makers of the Gold Bar Whiskey. The whisky packaging uses Avery Dennison's NFC tag, enabling an interactive customer experience.

'Collaborating with the team at Gold Bar Whiskey to develop this collection has been a fun experience,' said Montana. 'From the unique flavor profiles to the meaningful blend numbers and creative designs, the collection will offer a variety of selections for a gameday beverage, with a twist of nostalgia. I'm looking forward to sharing the whisky, as well as the experience of Gold Bar's incredible new Visitor Center here in San Francisco, with fans.'

Known for leading the 49ers to four Super Bowl victories, as well as winning the National Championship for Notre Dame, Montana was named the Super Bowl's Most Valuable Player three times. He is widely regarded as one of the greatest NFL quarterbacks of all time.

Founded in 2013, Gold Bar Whiskey is known for its double-casked wine-barrel-finished whiskeys. Smooth, with a complex flavor profile, and housed in an iconic gold bar-shaped bottle, the whiskeys are expertly crafted by Master Blender Montgomery Paulsen, a second-generation winemaker from Napa Valley. Gold Bar Whiskey is available in over 25 countries and continues expanding in Europe, South America and Asia.

The Joe Montana Whiskey Collection was crafted for whisky enthusiasts and the 49ers Faithful, who have been vital supporters of the Distillery. The brand collaboration is set to receive continued exposure as Gold Bar Whiskey enters its fourth year as the 'Official Whiskey' of the San Francisco 49ers.

Beyond the liquid, many details have been incorporated to make this a true collectors' whisky. Blend No. 273 represents the number of Montana's total career touchdown passes. The artwork on the bottle incorporates the 49ers throwback 1970s/80s oval logo and Montana's signature. The illustration depicting his historic touchdown celebration in Super Bowl XXIV was created by a 49ers superfan and artist, Rita Oak.

Gold Bar has created brand packaging called 'The Patch', working with Avery Dennison. Each Joe Montana Collection bottle comes with a neck tag with a wearable, iron-on Montana patch that creates an interactive fan experience. The patches have an embedded a near-field-communication (NFC) chip that, when tapped with a smartphone, directs the fan to exclusive Montana content, including a special 'secret' video of Montana at the Gold Bar Distillery preparing, step-by-step, his signature cocktail 'The Golden Joe' made with Gold Bar Whiskey, orange juice, lime juice and ginger beer. Gold Bar Whiskey's 'Tap the Patch' slogan will be a key part of the Joe Montana marketing campaign.

News in Brief

Kellanova unveils reduced plastic packaging for its snack brands

Kellanova has reduced the amount of plastic used in packaging (compared to the same volume last year) of its three brands, Cheez-It Snap'd, Cheez-It Puff'd and Club Crisps, while maintaining the same amount of food in each package.

The packaging designs were optimized, reducing the total material weight for these three foods by 672,000 pounds, reducing 124,000 pounds of plastic and 548,000 pounds of corrugated cardboard used for shipping cases (annually). This reduction of plastic is almost the same weight as 140,000 NFL footballs.

This packaging design aligns with Kellanova Better Days Promise's commitment to work towards 100 percent reusable, recyclable, or compostable packaging by the end of 2030. Additionally, as a signatory to the Ellen MacArthur Foundation New Plastics Economy Pledge, Kellanova aims to reduce virgin plastic by 5 percent.

Kellanova's framework to ensure packaging is innovative and sustainable involves four approaches: reducing packaging across the portfolio, removing certain plastic items and packaging materials, redesigning packaging to be recyclable or compostable, and increasing recycling.

Polytag QR codes used in Ocado DDRS trial

Over 20,000 cash rewards have been redeemed by consumers as part of the first nationwide digital deposit return scheme (DDRS) trial by one of the major UK supermarket chains, Ocado Retail and recycling tech app Bower, utilizing QR codes provided by recycling tech firm Polytag.

Since July 14, 2023, Ocado Retail customers have been able to claim monetary rewards for recycling any of its own-brand two and four-pint milk bottles using Polytag's unique QR codes, redeemable via recycling app Bower. As revealed in an end-of-trial report, the trial saw over 20,000 Ocado Retail milk bottles scanned by over 3,000 consumers using their smartphones before being deposited into home curbside recycling.

Held across England and Wales, the initiative offered monetary rewards and charity donations via the Bower app, in which customers set up their account and add their regular recycling bins and bank account.

The QR code integrated into the milk bottles' labeling is scanned via the app, the bottle is disposed of in their registered at-home recycling bin, and the reward is withdrawn into their bank account. Up to GBP 4,000 worth of rewards were obtained during the nine-week-long trial.

The trial seeks to meet customers' appetite for retailers to offer recycling initiatives and improve national recycling rates ahead of the government's DRS scheme set to come into place in 2025.

Polytag offers customers a digital option with its GS1-approved, unique QR codes seamlessly integrated onto packaging labels at the printing point.

Invisible UV tags are also applied to the labels, enabling tracking and tracing back to dedicated recycling centers and offering brands and retailers insights into the whereabouts of their products and packaging.



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Europe on pace for recovery from de-stocking

The European labels industry spent 2023 recovering from the multiple crises of 2022, and the signs for 2024 are looking more positive. Andy Thomas-Emans reports

The European label market spent the best part of 2023 recovering from the multiple crises that hit the industry throughout 2022.

The global supply chain had faced severe structural problems: with ports clogged with unloaded shipping; a continued shortage of computer chips; and an unprecedented months-long strike by UPM forestry workers which made it impossible to meet end user demands for paper labels and packaging.

When Russia invaded Ukraine, Europe experienced surging inflation in energy and raw materials costs and further blockages in the supply of raw materials critical to the manufacture of label machines, materials and consumables.

A survey by the European Label Association, Finat, in the middle of 2022 found that 60 percent of converters had suffered financial losses of up to 6.6 percent as a direct result of label industry supply chain issues. Losses of over 4 percent were caused by problems in the wider packaging supply chain.

At the same time, rapidly increasing inflation reduced European consumers' disposable incomes, impacting what they had available to spend on packaged goods of all kinds.

Labelstock consumption

These multiple crises and uncertainties heavily impacted the last quarter of 2022 and rolled into the opening quarter of 2023. Compared to the fourth quarter in 2021, European consumption of paper and filmic roll labelstocks decreased by no less than 24 percent, the sharpest year-on-year decline in a single quarter recorded since Finat commissioned the collection of quarterly statistics in 2003.

The detailed numbers behind the late 2022-early 2023 collapse are shocking. European self-adhesive label volumes fell by 21.4 percent in Q4 2022, and 15.6 percent in the beginning of 2023. Other label formats also declined, albeit more slowly than self-adhesive labels.

Consequently, label converters decided

"A key influence on the future development of the European labels and flexible packaging industry from this year will be the adoption by the EU of the Sustainable Product Regulation"

to wind down inventories and postponed the procurement of new label stock and capital investment. Brand owners similarly stopped ordering labels and ran down their warehouse stocks.

This industry-wide de-stocking manifested itself in declines in key market segments like food, beverage, health and personal care and automotive. All this was amid fears of a looming global recession.

Finat president Philippe Voet stated: 'Our industry demonstrated its essential role in keeping the critical infrastructure alive during the lockdowns of 2020 and helping the economy back on its feet a year later. However, that year also revealed the first signs of the vulnerability of our globally consolidated supply chains, and economic recovery was held back by the lack of raw materials, consumables, components and labor.'

The first half of 2023 showed the industry starting to claw back some growth, as demand for food, beverage, health and personal care labels crawled upward through Q1 and Q2 2023, but at growth rates still well below late 2021 and early 2022 levels. Figures for Q3 and Q4 2023 show this more positive trend continuing as inventories were cleared and label stock purchasing resumed.

Labelexpo Europe 2023 was a real turning point, with a flood of equipment orders demonstrating the pent-up demand that had been building since the end of the pandemic.

This investment spree looks set to continue. A Finat survey showed 74 percent of the association's converter members planning to invest in digital presses in 2024 and 57 percent in conventional equipment. It is noteworthy, however, that almost one-third are delaying their purchases until

2025 in the light of ongoing uncertainties.

Sustainability and traceability challenges

A key influence on the future development of the European labels and flexible packaging industry from this year will be the adoption by the EU of the Sustainable Product Regulation. Released under the framework of the EU Green Deal, it sets out the European Union's strategy of becoming the world's first climate-neutral region by 2050.

The regulation incorporates the EU Digital Product Passport (DPP), which means whole classes of products will need to have 'digital twins' which include a whole raft of information about the product's life cycle, including carbon footprint, recyclability, packaging and materials component breakdown and much more. This information could in practice be accessed through scanning a QR code or via an RFID chip.

The DPP applies to 'products manufactured in Europe or exported into the EU. Only a few sectors, including food, feed and medicinal products, are exempted.

The wider impact of the Circular Economy Directive will soon be felt in the labels and packaging industry since it prohibits placing onto the EU market any products whose packaging cannot be separated, collected and returned to the same value application.

Although these regulations represent challenges for the label converting industry, there are also major opportunities that we will explore in L&L over the coming year.



Continue reading for more on the North American label market



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North American market navigates key challenges

Facing rising costs, uncertain demand and workforce challenges, converters are turning to automation for answers. Christine Won reports

The label and packaging market in North America has seen significant growth in recent years, driven by various factors such as the post-pandemic boom in e-commerce, technological advancements and shifting consumer preferences. Research shows the market is poised for further expansion.

The North American print label market, estimated at 9.8 billion USD in 2024, is projected to grow at a CAGR of 3.5 percent to reach 11.7 billion USD by 2029, according to research from Mordor Intelligence. Yet key challenges loom ahead.

“We’ve been talking about workforce challenges with converters for more than a decade and we have never seen this issue as acute as it is currently”

Economic constraints and higher costs are churning challenges for the industry. This is met by depressed M&A activity amid high-interest rates as converters aim to automate, spurred both by labor shortages and innovation within the sector.

Last year saw the market softening, as converters described in the state of the industry in the 2023 TLMI Market Watch report. The biggest market force impacting converters was customers scaling back-order volumes. In 2024, label converters and suppliers in North America are still dealing with lingering uncertainty.

‘The struggle to balance supply and demand is a key concern as companies try to align their inventory levels and cost of goods sold with fluctuating demand,’ says Jennifer Dochstader, principal of industry research and marketing firm LPC. ‘The majority of label buyers and brands have made their way through the excess inventory levels that were a result of supply chain disruptions and shortages. However, there remains uncertainty about when the high-volume orders will return as converters continue to see an influx of smaller orders and less predictable order patterns.’

Compounding that equation is the woes of the modern-day workforce.

Like other industries, the labeling and printing world is struggling to fill vacancies as specialist veterans age out of the market at an unprecedented rate. ‘Retaining and hiring quality labor remains front-of-mind for converters,’ Dochstader says.

When asked about technological investments planned for the year, a number of converters intended to purchase a press due to the difficulty of finding a second- or third-shift operator. ‘They view this as the only way they can effectively add capacity,’ Dochstader says. ‘The impossibility of securing operators for night or weekend shifts left them with little choice other than adding to their capacity for more favorable dayshift work.’

Dochstader adds: ‘We’ve been talking about workforce challenges with converters for more than a decade and we have never seen this issue as acute as it is currently.’

All of this means automation is accelerating under the pressure of these labor shortages.

‘The aging workforce and the difficulty in finding replacements for positions on the production floor will continue to drive converters toward modernizing their equipment and automating where possible,’ Dochstader says. Still, she notes this technology-driven approach also presents an opportunity for companies to innovate and stay competitive in a market that is speeding toward digital solutions and sustainable practices.

Depressed M&A

Meanwhile, current economic conditions — from inflation to reduced debt position for lending — are also dampening the industry’s appetite for mergers and acquisitions.

In recent years, aided by unprecedentedly low-interest rates, M&As have been a major driving force in the industry, reshaping the landscape of the North American market. ‘With higher interest rates, the pace of M&A in the narrow web industry has decreased significantly,’ Dochstader says. ‘While we’ve still witnessed some of the industry’s largest players acquire smaller converter companies, private equity has made very few deals this year in our industry.’

Still, it’s not a full stop but more of a halt. ‘As soon as interest rates start to come down, we anticipate private equity re-entering the market with a renewed focus since during the pandemic our industry proved just how resilient it truly is,’ Dochstader says.

Bob Cronin, managing partner of M&A consultancy firm The Open Approach, agrees in his M&A column for L&L: ‘Transactions will not stop; however, we can expect to see the valuations and transaction structure change around these circumstances.’

Evolution of flexo

In terms of technology, flexo is evolving, further empowering converters.

Flexo made a comeback at Labelexpo Europe 2023, in sharp contrast to Labelexpo Americas 2022, and continues full steam ahead. Wider, mid-web 26in presses have emerged ‘as powerhouses for diversification, giving converters the option to move into new markets, and to be more efficient in markets they already operate in,’ as Andy Thomas-Emans, L&L strategic director, writes.

Aptly, this ‘digitization of the flexo process’ is a key theme at this year’s show, says Tasha Ventimiglia, event director of Labelexpo Americas 2024, as flexo OEMs return to the show at the Donald E Stephens Convention Center from Sept 10-12.

Looking ahead, flexo purchases are projected to outpace digital this year, though LPC expects the latter to pick up again in 2025. A recent LPC survey of 102 label converters across the US and Canada shows ‘a significant number’ of companies that froze CAPEX spending in early 2023 due to market conditions now plan to purchase a press in 2024, according to Dochstader.

Linnea Keen, TLMI president, in the 2023 Market Watch report, said: ‘It’s clear that we are navigating times of unprecedented change and evolution in our industry.’



Labelexpo Americas returns to Rosemont, Illinois on Sept 10-12. Scan the QR code for more information



Packaging design trends shaping 2024

Step into 2024 as brands now prioritize more than just eye-catching designs. Major considerations such as sustainability, inclusivity, creativity and anti-counterfeiting are shaping the industry trends. Read on to discover how innovation is redefining packaging design to engage with consumers. Akanksha Meena writes

Reduced plastic and mono-material packaging

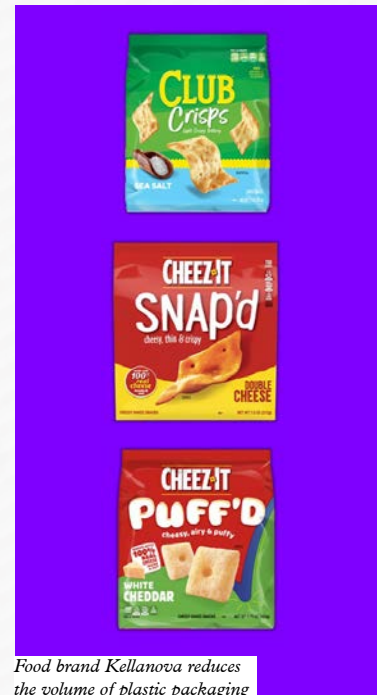
In 2024, a leading trend in packaging revolves around a significant reduction in plastic usage, as brands increasingly prioritize sustainability. The shift is further encouraged by sustainability regulations being implemented by governments around the world and making brands responsible for their CO2 emissions and overall environmental footprint. Brands are minimizing the use of virgin plastic and opting for materials that facilitate easier recycling.

Kellanova, for instance, has taken substantial strides by reducing the volume of plastic in the packaging of its brands, Cheez-It Snap'd, Cheez-It Puff'd, and Club Crisps, while maintaining the same quantity of food in each package. Furthermore, Mars China has joined the momentum by introducing a Snickers bar featuring dark chocolate cereal in mono-material flexible packaging, demonstrating the industry's innovative approaches to reducing plastic waste.

Material manufacturers today offer innovative sustainable materials that enable easier recycling, materials made of recycled content and materials that are not dependent on the usage of fossil fuels.



Mars China introduces a Snickers bar in mono-material flexible packaging



Food brand Kellanova reduces the volume of plastic packaging

Custom packaging

The trend of customized packaging has gained momentum as brands strive to establish a deeper connection with consumers through personalized experiences. In the era of advancing print technology, the ability to print custom packaging has opened up exciting possibilities for brands to tailor products to individual preferences.

A notable example is Nutella, which has allowed customers to personalize their jars with names on the label. This level of customization not only adds a touch of uniqueness but also fosters a sense of ownership and emotional attachment to the product. As we head into 2024, this trend will continue to flourish, with more brands embracing the power of customized packaging to create memorable and meaningful interactions with their consumers.



Nutella allows customers to personalize their jars with names on the label



Coca-Cola trials on-pack AI-powered QR code for an immersive consumer experience

Interactive packaging

The emergence of interactive packaging through QR codes has revolutionized the consumer experience by seamlessly connecting them with a brand's digital realm. By scanning these codes, consumers can gain instant access to a wealth of information about the product and the brand, fostering a deeper connection.

Brands such as Coca-Cola make effective use of QR codes to engage with customers. Coca-Cola released Y3000 Zero Sugar limited edition variant with an on-pack AI-powered QR code that offers consumers an immersive experience. Consumers could scan an on-pack QR code to access the Coca-Cola Creations Hub, where they can filter photos through the custom Y3000 AI Cam to envision what their current reality could look like in the future and buy fashion brand Ambush merchandise.

Croatia-based wine brand Enosophia uses a QR code on its labels that will trigger an audio or visual event when scanned using a smartphone.

Inclusive packaging

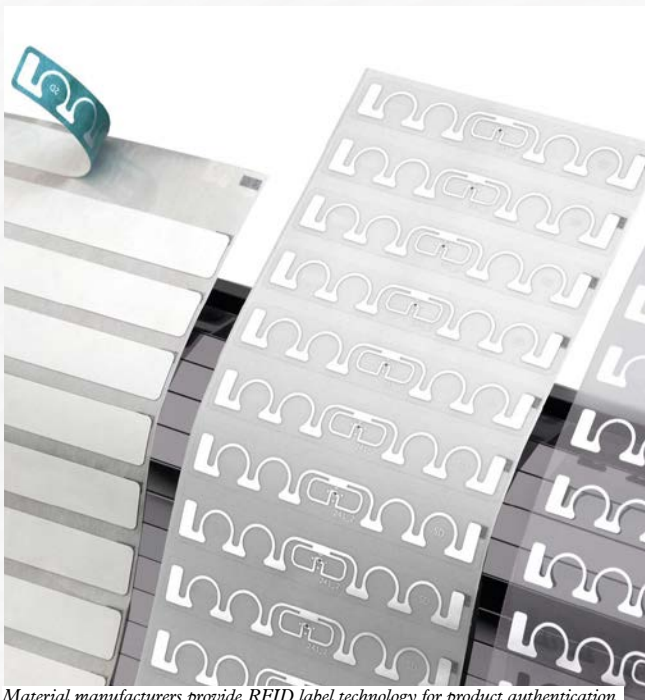
An encouraging trend of inclusive packaging is seeing traction within the packaging industry as brands recognize the importance of accessibility. An increasing number of brands are incorporating Braille on their labels and packaging for visually impaired consumers. This thoughtful integration of Braille not only provides essential information about the product but also empowers visually impaired individuals to make informed choices independently.

For example, beauty product brand L'Occitane has demonstrated a commitment to inclusivity by incorporating Braille on its labels, ensuring that important information about its products is readily available to those with visual impairments.

The latest in finishing and embellishment technologies today empower brands to include embossed and raised effects to include Braille on labels. Beyond that, these raised effects can be customized with digital finishing capabilities, providing a customizable touch to the tactile elements of the packaging.



Latest finishing and embellishment technologies empower brands to include embossed and raised effects to include Braille on labels



Material manufacturers provide RFID label technology for product authentication

Tamper-evident packaging

The global concern of counterfeiting can be met head-on with the integration of tamper-evident labels and packaging using RFID technology. Employing these technologies can ensure product tracking, authenticity and safety in the global marketplace. This integration not only protects brand reputation but also instills confidence in consumers, assuring them of the genuine nature of the products they choose.

Coupled with other tamper-evident features, such as holographic seals or specialized adhesives, these advanced technologies empower businesses to protect their brand reputation while delivering peace of mind to consumers.

The implementation of Gs1 Digital Link is expected to gain traction, especially in light of Sunrise 2027, as more brands recognize the importance of adopting this advanced technology.

Material and ink manufacturers, recognizing the global issue of counterfeiting, are developing products to ensure product authenticity.



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Cautious optimism in Latin America

Optimism remains for the year ahead despite a sluggish Latin American market in 2023. James Quirk reports

As in much of the world, 2023 saw a subdued performance from the Latin American label market. High inflation caused a dip in consumer demand, meaning excess stock that accumulated following the previous year's material shortages took longer than expected to flow through the supply chain.

After a strong rebound from the pandemic and continued resilience in early 2023, economic growth in Latin America and the Caribbean slowed from 4.1 percent in 2022 to 2.3 percent in 2023 and is projected to remain at around this rate in 2024, according to the latest Regional Economic Outlook report from the IMF.

After reaching 7.8 percent in 2022, headline inflation in the region (excluding Argentina and Venezuela) declined to 5 percent in 2023 and is forecast to fall to 3.6 percent in 2024.

While globally, emerging markets and developing economies are projected to have 4.4 percent average growth, Latin America's GDP is expected to expand annually at about 2.5 percent, similar to its pre-pandemic historical average.

Yet as inflation continues to fall, consumer confidence should return, so suppliers to the region remain cautiously optimistic for improved market conditions in 2024.

One bright spot is Mexico. The success of the first Labelexpo Mexico exhibition last year reflected the strong recent growth in that market, in part thanks to nearshoring: the country's manufacturing sector is thriving as US companies look to shorten their supply chains.

'Mark Andy saw significant growth in Mexico last year. It was our strongest international territory,' says John Vigna, the press manufacturer's Latin America sales manager. 'Nearshoring has been key, but there has also been a rebound in the value of the Mexican peso – it is the strongest it has been for many years.'

Elsewhere in the region, Vigna reports early signs of recovery in Venezuela and Argentina – both beset by rampant inflation in recent years. 'There is the beginning of an uptick in business in Venezuela. We have a large installation base there, mainly from before all the economic problems, and a strong local agent. In Argentina, converters have responded positively to the new president Javier Milei, and enquiries have increased. There is deregulation going on and the country is trying to gain stability, but it is early days.'

Martin Fraire, CEO of Argentina-based distributor Leftech, says that 2023 was good for the country's converters, but hard for any suppliers importing materials from abroad. 'Inflation was rising so fast and it was hard to convert pesos into dollars to pay for imports. But it was a good year for converters – they were spending their money as quickly as possible, as were the brands. This year could be tough because the country is running a huge deficit and it will take a while for the situation to improve.'

Argentina's rightward shift following the election of libertarian Milei is the exception among a move to the left in the region's bigger markets – Brazil, Chile and Colombia have all elected left-wing presidents in recent years. Capital equipment expenditure typically slows in those circumstances, says Vigna, as companies become more cautious about investing. 'The Chilean market, for example, is always quite stable, but even there, they have had

"Nearshoring has been key, but there has also been a rebound in the value of the Mexican peso – it is the strongest it has been for many years"

some political issues which have had an impact.'

Vigna points to Central America as a region showing good growth. 'Guatemala is our strongest market there, but we have also been installing machines in Costa Rica and El Salvador, among others. Guatemala has a strong local industry, particularly in the fruit label market as it is a big exporter of fruit.'

Overall, sales in the region have remained 'pretty consistent' in recent years, according to Vigna, with 2021 (when Mark Andy achieved record sales in Latin America) and Mexico's performance in 2023 the main outliers.

This sentiment is echoed by Carolina Jaramillo, marketing director at Colombia-headquartered material manufacturer ARclad. 'Latin America has remained reasonably stable, with a slight reduction in demand across the continent. Some markets have been affected more than others. Central America is one area that has continued to show strong growth.'

Areas of growth

As consumers in the region dealt with high inflation, they increasingly turned to retailers' private-label brands and discounted goods. According to Kantar, the number of private label items purchased rose by 38 percent in Ecuador and 'even' 26 percent in Colombia, which it describes as 'the traditional brands' stronghold'.

Two label formats showing strong growth in Latin America are in-mold and shrink sleeve. The latter, according to Mordor Intelligence, is forecast to grow by 6.52 percent a year to 2026. Future Market Insights predicts IML to grow at a CAGR of 5.8 percent over the next decade, up from 2.6 percent from 2018-2022. It estimates the food segment represented 42 percent of the Latin American IML market in 2022, and forecasts it to grow by 1.9 times its current value from 2023 to 2033.

'Latin America remained a consistent market for us in 2023,' says Alex Cruz, sales manager for North and South America at Yupo, which manufactures synthetic materials for IML applications. 'It is keeping pace and showing solid growth. The market has not fluctuated as much as some other parts of the world. The adoption of IML continues to grow. We've seen a trend of brands replacing paper with sustainable plastics and as one of the few companies that are APR-certified that is an advantage for us. Sustainability is a key aspect, but IML also allows brands to increase their margins.'



Next up is a market focus article on the Indian label market. Continue reading for more



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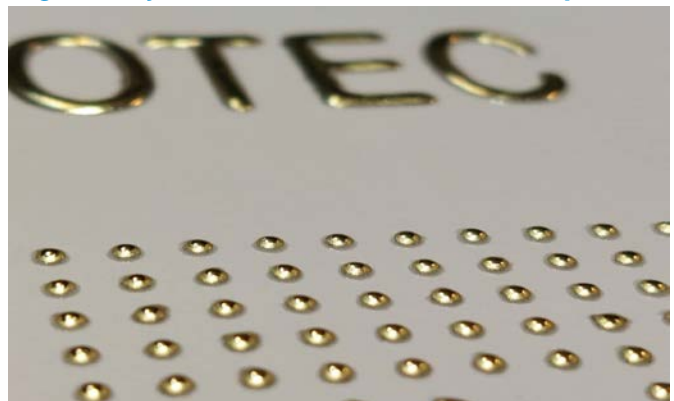


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India: Customization and sustainability riding high

The Indian government is promoting 'Make in India', which encourages start-ups, e-commerce and a younger generation of eco-conscious consumers. Adyasha Sinha reports

According to Mordor Intelligence, the global label market is expected to grow at a CAGR of 4.2 percent over the forecast period 2023-2027. However, in India, the labels market is expected to grow at more than double that rate, at 8.9 percent CAGR over the forecast period.

Many factors are driving this growth, such as increasing demand for more attractive and personalized packaging, and a rise in the packaged food industry. The growth of the e-commerce industry is another significant factor that is expected to propel this trajectory in an upward direction.

However, we can't overlook the challenges that the sector is facing: supply chain issues, price increases, worker shortages and ongoing non-availability of key production components.

Despite the challenges, India's label converters are resilient and resourceful, as they often are in times of crisis.

Personalized packaging

Consumer buying behavior in India has changed largely with a growing generation of younger consumers and a surge in the e-commerce sector. With that boom, there are now greater expectations for brands to create more personalized experiences.

'A notable trend on the horizon is the increasing adoption of digital embellishments in labels, as brands seek innovative ways to make their products stand out on retail shelves,' says Tej Prakash Jain, managing director of Monotech Systems. 'This shift is driven by the desire to enhance brand visibility and create a lasting impact on consumers.'

He continues: 'Furthermore, the demand for short and medium runs is projected to remain robust, driven by market needs for quick-turnaround mock-ups, overnight product launches, and the rising importance of personalization and customization.'

And hence, many converters are turning toward digital printing. According to Harveer Sahni, chairman of Weldon Celloplast, the number of digital press installations in the region grew from 22 in 2017 to between 60 and 65 in 2023. 'Earlier, digital has been slow for obvious reasons of high CapEx and high cost of consumables, but with the start-ups and customization fueling a demand for short runs, digital is steadily making inroads into label printing,' shares Sahni.

Indian manufacturers continue to gain momentum

As witnessed during Labelexpo India in 2022, Indian machine manufacturers were calling the shots while their Western counterparts were missing. As Labelexpo India returns this year, the story continues with cost-effectiveness being the major differentiator.

Giving his nod to the observation, Sahni, comments: 'The Indian label industry witnessed a long-awaited evolution. While new converters of roll labels and those in the lower end amongst label manufacturers relied on the Chinese or used presses, the higher end employed the latest international modular servo-driven presses with auto registration, all UV, quick change and advanced features.'

He continues further: 'In 2023 we saw the emergence of Indian label press manufacturers coming of age with matching specifications and competitive price tags, not only in India, but

"There is increasing adoption of digital embellishments as brands seek innovative ways to make their products stand out"

also internationally. Labelexpo India witnessed many Indian presses running live while the foreign brands were missing. The cost-effectiveness brought about a big increase in the number of printing companies and with that came intense competition.'

Leveraging the 'eco'nomics of sustainable solutions

Sustainability emerged as a dominant theme in the Indian label printing and flexible packaging landscape throughout 2023. The Indian label printing and flexible packaging industry grappled with an evolving regulatory landscape in 2023, as the Indian government intensified its focus on environmental sustainability and safety standards.

With EPR becoming mandatory in India, companies are shifting towards paper-based packaging or paper-based self-adhesive labels.

Filmic labels are also evolving. Talking on this theme, Kulbhushan Mallik, global business head at Cosmo Films, comments: 'The sleeve segment, over a period of time, will see a lot of transition happening from PVC type of shrink sleeves to PET-G or PET type of sleeves, which is more sustainable and basically has no harmful impact to the environment.'

Katsuhisa Asari, managing director, Konica Minolta Business Solutions India, says the move to digital printing is also a move towards sustainability: 'Digital printers eliminate the need for plates, thus reducing energy consumption and waste generation. Our toner generates an environmentally sustainable print by utilizing approximately 25 percent less water to manufacture compared to a conventional polymerized toner.'

Print fuses with smart technologies

In 2023, the Indian label printing and flexible packaging industry witnessed a notable convergence of smart technologies in its operations.

Asari informs that along with increasing use of variable data printing, the company continues to see rampant innovation among printers, and predicts the industry will continue to see a growing synergy between print and augmented reality. He also touches upon the integration of artificial intelligence opening new dimensions in prototyping.

As the industry continues to evolve, collaborative efforts among manufacturers, suppliers and converters will play a pivotal role in shaping the future of label printing and flexible packaging in India.



Labelexpo India returns to Greater Noida, Delhi on 14-17 November. Scan the QR code for more information



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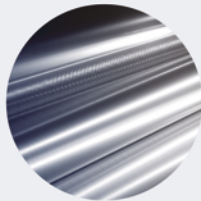
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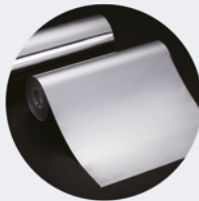
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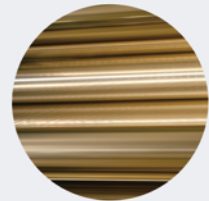
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Asia-Pacific weathers the storms

'APAC set for significant growth', read the market focus article last year. It predicted the region to grow twice as fast as the rest of the world. So, was 2023 a massive success or a streak of unfulfilled hopes? Piotr Wnuk reports

The Asian Development Bank (ADB) has raised its economic forecast for developing economies in the Asia-Pacific region after robust domestic demand drove higher-than-expected growth in the People's Republic of China (PRC) and India.

'Developing Asia continues to grow at a robust pace, despite a challenging global environment,' comments ADB chief economist Albert Park. 'Inflation in the region is also gradually coming under control. Still, risks remain, from elevated global interest rates to climate events like El Niño. Governments in Asia and the Pacific need to remain vigilant to ensure that their economies are resilient and that growth is sustainable.'

In the third quarter of 2023, the economies of most countries in Southeast Asia showed pockets of growth and resilience despite the cumulative effects of monetary tightening and slower global demand.

Labelexpo Southeast Asia revitalizes the region

The last edition of Labelexpo Southeast Asia 2023 in Thailand best confirmed the region's economic climat. It brought together almost 7,500 converters and brand owners from across the ASEAN and broader Asia-Pacific region, mainly from Thailand, but also from Malaysia, China, Indonesia, India, Singapore, the Philippines, Vietnam and Australia.

Multinational brands are moving to the region, and advanced retail infrastructure is emerging, leading to growing requirements for higher quality packaging – including from local brands which need to compete with the global giants. Letterpress, offset and screen printing remain robust, but regional label converters are starting to look at flexo and digital.

Digital for those who can afford it

'Globally, there's a downward trend in the macro economy, leading to shrinking orders in the label printing industry,' says Max Goh, sales executive at Malaysia-based Sen Labels Machinery. 'This shift has pushed towards the rise of digital printing, mainly due to reduced order quantities and challenges in finding skilled operators for conventional methods like rotary flexo printing. CEOs are turning to digital printing as a viable solution, especially accelerated by the impact of the pandemic over the last three years.'

According to IDC Worldwide Industrial Printer Tracker, a total of 52 units of digital label and packaging presses were shipped just in the first quarter of 2023 for Asia-Pacific customers excluding Japan (APeJ), with a sequential growth of 15.6 percent and an annual growth of 23.8 percent.

The primary application, label printing, experienced significant growth, with a quarterly increase of 44.4 percent to 39 units.

The digital label and packaging market witnessed steady growth in recent years, especially post-pandemic, defying the economic downturn during the first quarter of 2023.

'Fueled by the surge in personalized printing and customization, the digital label and packaging market is witnessing robust growth,' says Sharon Cheng, senior market analyst at IDC Asia-Pacific. 'In an era where consumers demand tailored experiences, brands are turning to digital solutions to meet these expectations.'

Australia-headquartered QLM Group opened a new manufacturing facility under QLM Label Makers Vietnam - Hoang Ha Label (HHLC-QLM) in Ho Chi Minh City in December 2023 to meet the increasingly diverse Vietnamese and broader Asia-Pacific

"Developing Asia continues to grow at a robust pace despite a challenging global environment"

market demands and to house the country's first HP 20000 press.

The company, which also operates production facilities in Malaysia, Cambodia and Bangladesh, intends to expand its flexible packaging services, including a stand-up pouch, three-sided seal, center seal, sachets and box bottom bag.

'We continue to build an international company, managed locally, respecting local customs and traditions while investing in the technology and people to ensure we deliver you innovative and effective label and packaging solutions that meet the needs of today's ESG environment,' says Simon Pugh, managing director of the QLM Group.

'In Asia, letterpress printing dominated for years, largely due to strong Japanese machine manufacturers. However, this has changed in the last five years, with a shift towards flexo technology,' responds Goh. 'Despite this, flexo printing market share remains below 10 percent due to its suitability for large-scale orders. Digital printers have a minimal market share due to high initial costs and lesser concern about operator shortages in the Asian market.'

According to Goh, in contrast, Europe leads the label printing industry and prioritizes digitalization and user-friendly equipment. He says that digital printing machines are highly favored for their ability to tackle human resources shortages and short-run jobs.

Flexo humming along

Tim Klappe, managing director for Asia Pacific at MPS Systems, at the beginning of 2023, thought that business would increase rapidly after the pandemic.

'Well, this did not happen,' says Klappe. 'Although the label print business in the Asia Pacific hummed along better than in other parts of the world, the growth was nowhere we thought it would go. As machine builders, we were plagued by weak exchange rates in Asia and high interest rates. Buying new equipment for many printers in Asia Pacific is not a very conducive environment—at least, less than what we expected at the beginning of the year.'

'Things changed around September during the Labelexpo Europe. Maybe we were all happy to see each other again and celebrated this with new machine orders. For MPS and Asia, the Labelexpo was a turn-around point, after which we received many orders. It has to do with the lower interest rates, strengthening of some Asian currencies, and the still excellent forecasts for the label business in the Asia Pacific region. Service was good throughout the region.'

One of the latest reports by Mordor Intelligence estimates the Asia-Pacific self-adhesive labels market to reach USD 16,229.33 million by the end of this year, and it prognoses a steady growth at a CAGR greater than 6.3 percent between 2024 and 2029. It is slightly more conservative than last year's 7.34 percent, but still presents excellent growth opportunities in the region.



Continue reading for more on the African market



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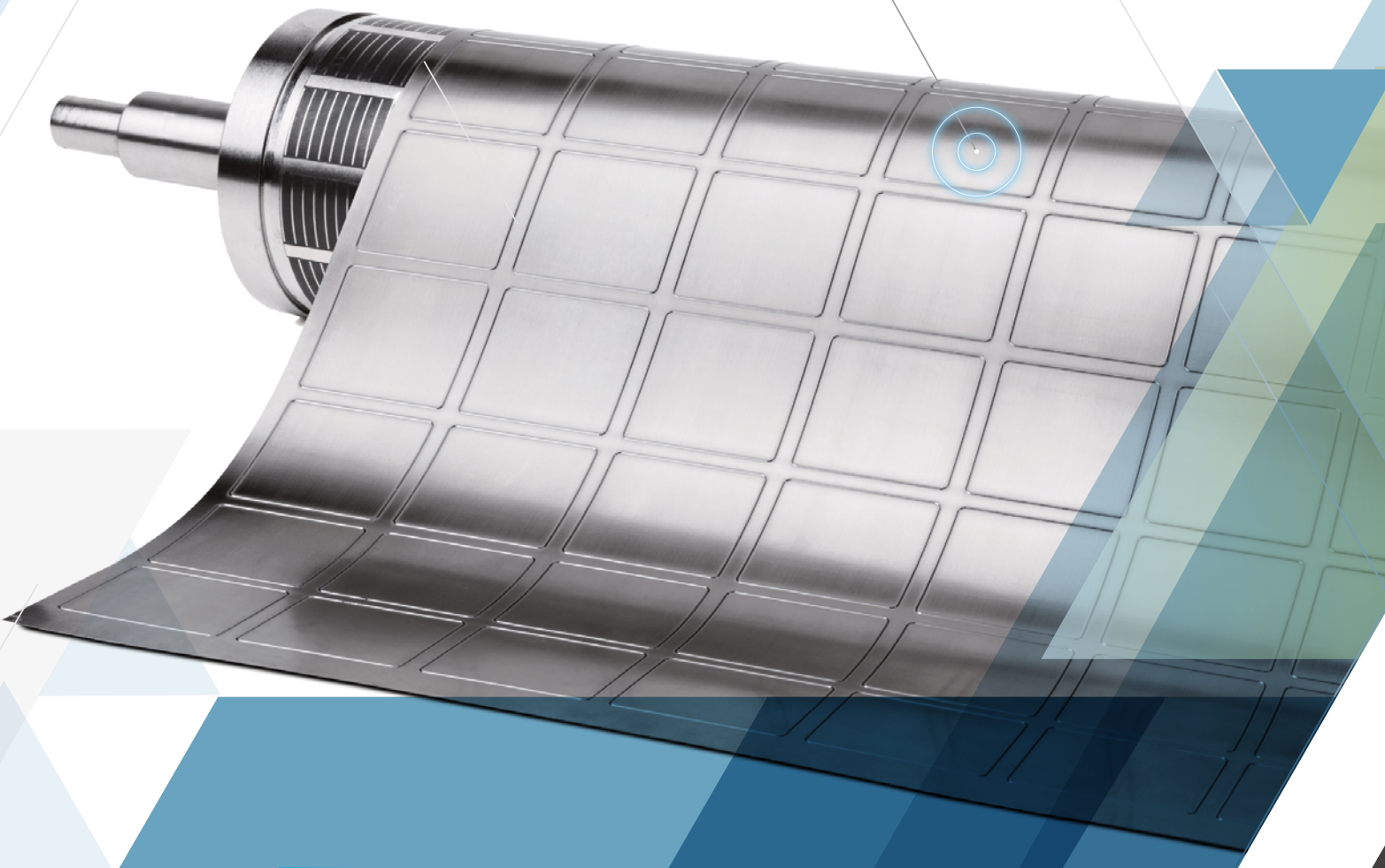
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All eyes on Africa: Growth potential with some challenges

Economic observers are paying close attention to Africa, and the label industry takes note, Heather Roth reports

According to an Africa 2024 outlook report by Stears, a Nigeria-based economic analysis and data-driven insights company, overall growth for the continent is forecasted at 4 percent, a notable increase from 3.3 percent in 2023. It also predicts East Africa is set to outshine other regions in 2024 growth with Rwanda, Kenya, Tanzania and Uganda leading the way.

“Vendors, distributors and retailers are showing remarkable adaptability”

The Economist Intelligence Unit (EIU), the research and advisory unit of the Economist Group, predicts that Africa will be the second fastest-growing major economy in the world in 2024 behind Asia. It advised foreign investors and economic observers to pay close attention to East African nations, echoing Stears' prediction, particularly Kenya, Ethiopia, Uganda, Rwanda and Tanzania.

The World Bank also projects more marked growth pickups in North Africa and Sub-Saharan Africa, also predicting several economies in Sub-Saharan Africa anticipate further recoveries in tourism, which has yet to return to pre-pandemic activity levels.

Also according to the World Bank, growth in Sub-Saharan Africa is projected to rebound to 3.8 percent in 2024. However, elevated costs of living continue to limit consumption growth, and political instability has increased in parts of the region.

Growth in Sub-Saharan Africa decelerated to an estimated 2.9 percent in 2023. Various country specific challenges contributed to this slowdown, including higher input prices for businesses in Nigeria and an energy crisis in South Africa. Growth in the region's three largest economies—Nigeria, South Africa, and Angola—slowed to an average of 1.8 percent in 2023.

In Nigeria, the region's largest economy, growth softened to an estimated 2.9 percent in 2023 while in South Africa, growth weakened further in 2023, to an estimated 0.7 percent reflecting the energy crisis and transport bottlenecks, and weaker demand in a context of weak job creation, soaring prices and monetary policy tightening.

Utility woes

Power outages in South Africa hit record highs in 2023, holding back manufacturing which was also felt by printers.

Chris de Beer, regional manager at Infosource forecasts growth for many segments and territories across Africa, but the performance of the South African market casts a shadow across the continent's printing markets due to the ongoing electricity utility woes, with no end in sight for load shedding.

'Since South Africa is one of the largest markets in Africa, this has a significant impact on continent-wide growth,' says de Beer. 'However, vendors, distributors and resellers are showing remarkable adaptability in the face of the challenges they face.'

Many, for example, are diversifying their portfolios with services and solutions that enable customers to continue to print with no to little interruption during power outages such as implementing backup generators.'

Professor Raymond Parsons, an economist at the North-West University shares that South Africa's economic outlook in 2024 will be influenced by global economic trends, geopolitical developments, domestic infrastructural challenges, effective government's implementation of reform commitments, and the pending elections in the country. He thinks that South Africa's economic performance in 2024 will be driven by trends in exports, consumer spending and investment.

Light on South Africa's horizon

However, it is not all darkness for South Africa. Travel to South Africa continues to increase after a sharp drop in 2020 to 0.81 percent of GDP due to lack of travel caused by the Covid-19 pandemic (previously at 2.34 percent).

Lullu Krugel, PwC South Africa Chief Economist, made this comment about South Africa: 'These country-specific challenges are expected to dissipate somewhat over the medium to long term. In the meantime, there is scope for South African organizations to turn these crises into opportunities during 2024 to create value for their stakeholders and society in general. Periods of predicament can create a window of opportunity for impactful change and leaders — both in the public and private sector — should not miss the chance to seize it.'

The landscape for printers

Tradeshow participation for African printers was positive in 2023 with highly attended events throughout the country including Propak East Africa, Propak Ghana, and Propak Cape. Labelexpo Europe welcomed visitors from 27 countries in Africa.

Sustainability is a continued focus for African printers going into 2024 with preference for eco-friendly materials, recyclable solutions, and sustainable packaging.

For South Africa, as the country's leading exporter of wine, adherence to the European Union's new regulation that took effect December 2023 requiring all wine labels show detailed information on ingredients, nutritional values, additives, allergens and more will require integrating print technologies that can adapt and inspect QR codes. This implementation could open new market opportunities for label printers.

All things considered, 2024 signals growth and opportunity for Africa as a whole, with some countries predicted to lead the way while others navigate more challenging waters. As Krugel said, periods of dilemma can create a window of opportunity for impactful change.



Continue reading to learn more about the Chinese market

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China: Optimistic despite headwinds

Recovery in post-Covid China has not been smooth, and the label industry is no exception. Still, innovation in the region continues
Yolanda Wang reports

According to government data, the value of the Chinese packaging and printing industry will reach 3.70 trillion RMB (USD 0.5 trillion) in 2023. Labeling remains an important player, posting a growth rate significantly higher than both packaging and general printing sectors.

According to a Smithers report published in March 2023, Asia-Pacific was the world's biggest label printing market in 2022, valued at USD 15.9 billion USD, with a total output of 36.5 billion sqm.

In the past three years, the Asia-Pacific label market grew by only 0.5 percent YOY, significantly lower than the 6.2 percent achieved in the pre-Covid period between 2016-2019. In 2022, with the epidemic over, the market recovered strongly, growing by 7.3 percent. This rapid growth is expected to continue until 2026, with a projected growth rate of 5.7 percent in label volume and 4.5 percent in sales.

China is the largest market for label materials in Asia-Pacific, accounting for 44.9 percent of sales in the region. In terms of consumption, the Chinese market accounts for 61.5 percent of the Asia-Pacific market. From 2016 to 2019, China's market volume grew at a CAGR of 7.0 percent and sales grew at a CAGR of 8.0 percent. Even during Covid-19, China's labeling industry continued to grow, though at a slower pace than in previous years.

It is expected that by 2026, the compound annual growth rate of China's label industry will be 6.1 percent, and the growth rate of sales will be 6.6 percent.

Flat and slow growth

As we enter 2024, China's label printing industry is facing a number of challenges including declining external demand, industrial destocking, and price increases.

The slowdown in overall growth rates has prompted the label industry to devote more time and energy to automation and digitization, prioritizing Industry 4.0, artificial intelligence, big data technology and the government-led drive towards a carbon neutral economy.

Digital Technology

Digital label press installations reached their highest level yet in 2023, with

"The installed capacity of digital equipment in China's label market exceeds 700 units"

installed capacity now exceeding 700 units. International brands account for about around 70 percent of this total, mainly driven by HP Indigo and Xeikon who entered the China market earlier than their competitors.

The remaining 30 percent of digital installations come from domestic digital press suppliers such as Flora, Pulisi, Haotian and HanGlobal. Pulisi says since the launch of its first digital press in 2021, its current global installation based has reached 120 units, of which more than 100 are installed in the local China market. In 2023 alone, there were more than 80 units new installations. For example, Foshan YDG has installed three Pulisi digital presses in the past two years.

The growth of China's digital label press industry has been driven not only by the increasing market demand for short-runs, customization, multi-SKUs, and shorter delivery times, but also because of increasing cost pressures faced by converters.

These include the increasing cost of raw materials and labor, and increasing costs complying with environmental legislation. At the same time converters are being pushed to improve quality and efficiency, reduce cost, and achieving green production targets.

The huge development potential of digital press technology has attracted new suppliers. For example, Weigang, which focuses on flexo and offset printing equipment, launched its first WG S350 digital press and ZJR S350 Pro Hybrid press during Labelexpo Asia 2023; conventional press supplier Label Source cooperated with digital press supplier HanGlobal and launched LabStar330S Hybrid flexo-inkjet press.

The continuous progress of digital printing technology has not only attracted more label converters to invest in digital presses, but also attracted new entrants. For example, Shenzhen Namda, a supplier of label anti-counterfeiting materials, has invested in Konica Minolta's AccurioLabel 230 and AccurioLabel 400 digital printing

presses respectively in 2022 and 2023 to expand its business into the label printing sector.

The upward digital trend is reflected in the finishing process. At this year's Labelexpo Asia, SEI, Vorey, Golden Laser, IECHO, Shengye, Jingwei Jingwei, Reborn, Darui, Koyo, Saga, Keneth and William displayed laser die cutting systems, while Kurz, DMS, Reborn, Rhyguan, and Brotech presented digital stamping and varnish machines.

RFID labels

RFID is regarded as a potential growth area for the Chinese market in the coming years.

The AloT StarMap Research Institute forecasts 39 billion RFID tags have been sold in 2023, and the RFID market will continue to grow by around 20 percent a year.

According to this survey, the output of China's UHF RFID Inlay industry accounts for about 70 percent of the global market.

At present, RFID is mainly used in the retail apparel sector, but RFID technology also has a big potential in the logistics field. In April 2023, RFID tag shipments for China's leading logistics company Cainiao exceeded 100 million units. This is less than two years after Cainiao publicly announced the technology initiative.

The Smart Label Trail during Labelexpo Asia 2023 saw suppliers including Avery Dennison, Muehlbauer, Voyantic, Yuanmingjie, Hadesheng, Chili, Taibao, HOACO, Shanghai Jinglu, Chankey, XGSun, OSRFID, ADA, Postek, Leidan, Summation Solutions, HWA-Tech, Wing Singa and SDIOT exhibit RFID technologies and services across the entire process of RFID label manufacturing and usage. A concurrent masterclass focused on RFID attracted more than 140 attendees on the first day of the show.



For more from Labelexpo Asia, turn to page 64

Label trends: Linerless labels

As governments around the world introduce sustainability legislations, more brands are pivoting toward eco-friendly packaging and practices giving way to linerless labels

What is linerless

A linerless label refers to the segment of the labeling industry that uses a self-adhesive label without a liner or backing paper.

Primary markets



Variable information print



Food



Beverage



Home and personal care



Pharmaceuticals



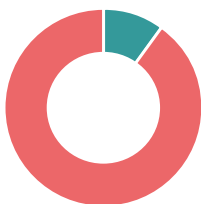
Retail

Total release liner volume

550,000 tons

Equivalent to 93 billion sqft (8.7 billion sqm) in Europe in 2021

Recycling rates of release liner



10% is recycled

90% landfilled or incinerated

About 100,000 labels produce 100kg of liner waste

Linerless label opportunity

Linerless labels market size:
estimated at

USD 1.94 billion

in 2024

Expected to reach:

USD 2.51 billion

by 2029

Growth rate: CAGR of

5.28%

between 2024-2029

think what's possible.

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Member of the Management Board

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