

Package Printing and Converting, An Industry Assessment: 2004-2009

I. Executive Summary.....	1
II. Introduction and Methodology	33
A. Objectives.....	34
B. Scope	35
C. Research Methodology	36
1. Number of Qualitative Interviews and Sample Mix	36
2. Number of Quantitative Studies and Sample Mix	37
3. Database Analysis.....	38
4. Secondary and Other Research.....	39
D. Demographics	39
1. Employee Size	39
2. Integrated or Independent Converters.....	40
3. Installed Presses	40
E. Thank You!	41
III. Market overview	43
A. Package Printer or Converter?	43
B. Number of Package Printers/Converters	45
C. Total Shipments	45
D. Value of Package Printing	47

IV. Package Types	49
A. Corrugated	50
1. Definition	50
2. Integrated or Independent	51
3. Number of Sites.....	52
4. Market Size	53
5. Converter, Package Printer, Commercial Printer.....	54
6. Substrate	55
7. How Corrugated Is Printed	56
8. Number of Presses.....	58
9. Equipment Purchase Plans	61
10. Business Issues for Corrugated Converters	64
11. Trends and Opportunities in Corrugated	66
B. Flexible Packaging	71
1. Definition	71
2. Integrated or Independent	72
3. Number of Sites.....	73
4. Market Size	73
5. Converter, Package Printer, Commercial Printer.....	75
6. Substrate	75

7. How Flexible Packaging Is Printed	76
8. Number of Presses.....	77
9. Equipment Purchase Plans	79
10. Business Issues for Flexible Packaging Converters.....	82
11. Trends and Opportunities in Flexible Packaging	84
C. Folding Carton.....	93
1. Definition	93
2. Integrated or Independent.....	94
3. Number of Sites.....	94
4. Market Size	95
5. Converter, Package Printer, Commercial Printer.....	99
6. Substrate.....	100
7. How Folding Carton Is Printed.....	100
8. Number of Presses.....	101
9. Equipment Purchase Plans	104
10. Business Issues for Folding Carton Converters	107
11. Trends and Opportunities in Folding Carton.....	109
D. Label and Tag	112
1. Definition	112
2. Integrated or Independent.....	114

3. Number of Sites.....	115
4. Market Size	116
5. Converter, Package Printer, Commercial Printer.....	117
6. Substrate.....	117
7. How Labels Are Printed.....	118
8. Number of Presses.....	119
9. Equipment Purchase Plans	121
10. Business Issues for Label Converters	125
11. Trends and Opportunities in Labels.....	126
E. Rigid Plastic.....	133
1. Definition	133
2. Cost of the Substrate.....	133
3. How Rigid Plastic Is Printed	133
4. Trends and Opportunities in Rigid Plastic	134
V. Package Printing Technologies.....	135
A. Installed Presses – Survey Findings.....	135
B. Installed Presses – Our Estimates.....	136
C. Press Purchase Plans	138
D. Flexography (Including FFG and RDC)	142
1. Survey Findings.....	142

2. Why Flexo Works Well for Package Printing	144
3. Market Share.....	145
4. Number of Flexo Presses.....	147
5. Inks and Coatings.....	147
6. Press Requirements.....	149
E. Offset (Sheet and Web).....	149
1. Survey Findings.....	149
2. Why Offset Works Well for Package Printing	151
3. Market Share.....	152
4. Number of Offset Presses	152
5. Inks and Coatings.....	152
6. Press Requirements.....	154
F. Gravure.....	154
1. Survey Findings.....	154
2. Why Gravure Works Well for Package Printing.....	155
3. Market Share.....	156
4. Number of Gravure Presses.....	157
5. Inks and Coatings.....	157
G. Screen.....	158
1. Survey Findings.....	158

2. Market Size	160
3. Number of Screen Presses	160
4. Why Screen Works Well for Package Printing.....	161
5. Inks and Coatings.....	162
6. Press Requirements.....	162
H. Letterpress	162
I. Digital.....	164
1. Survey Findings.....	164
2. Number of Digital Presses.....	164
3. Why Digital Works Well for Package Printing	165
4. Market Share.....	166
J. Combination Presses	167
VI. Inks and Coatings	169
VII. Services Offered By Converters.....	173
A. Converting Done.....	173
B. Security and Brand Protection	174
VIII. Package Design	177
A. Consumer Product Good Companies (CPGs).....	177
B. Private Label.....	178
C. Package Design	178

IX. Prepress.....	181
A. Packaging Trade Shops	181
1. Platemaking.....	181
2. CTP Purchase Intentions	181
3. Proofing.....	182
4. Business Threats.....	183
B. Platemaking By Converters	184
1. Where Plates Are Made: Converters.....	184
2. Digital Platemaking: Converters	186
3. Plans for CTP Adoption: Converters	189
C. Proofing by Converters.....	192
X. Trends and Their Impact.....	197
A. Package Design	197
B. Potential Shift of Advertising Dollars.....	200
C. Substrate Shifts	200
D. Printing Method Shifts	201
E. Role of Major Retailers	202
1. Primary Package Design.....	203
2. Secondary Package Design	203
3. Product Configurations.....	203

4. Private Label	204
5. Opportunities	204
F. Target Marketing and Cross-Promotion	204
1. Target Marketing	205
2. Cross Promotion.....	205
G. Government Regulations	206
H. RFID.....	207
1. Definitions.....	207
2. The Marketplace.....	208
I. Changing Bar Codes.....	210
J. Threat of Offshore Production	210
K. Commercial Printers Printing Packaging	213
1. Current and Planned Presses	216
L. Consolidation	217
XI. Conclusions, Recommendations & Implications	219
A. General.....	219
1. Market Status	219
2. Opportunities	220
3. Threats	220
4. Market Strategy	220

5. Product Strategy.....	220
6. Alliances.....	220
B. Prepress and Other Equipment Manufacturers	221
1. Opportunities.....	221
2. Threats	221
3. Product Strategy.....	222
4. Alliances.....	222
C. Press and Accessory Manufacturers.....	222
1. Opportunities.....	222
2. Threats	223
3. Market Strategy.....	223
4. Product Strategy.....	224
5. Alliances.....	224
D. Paper and Other Substrate Suppliers.....	224
1. Opportunities.....	224
2. Threats	224
3. Market Strategy.....	225
4. Alliances.....	225
E. Ink and Coating Manufacturers.....	225
1. Opportunities.....	225

2. Threats	226
3. Alliances	226
F. Film, Plate, and Supplies Manufacturers	226
1. Opportunities	226
2. Threats	226
3. Market Strategy	227
4. Product Strategy	227
G. Printers and Publishers	227
1. Opportunities	227
2. Threats	227
3. Success Factors	227
H. Converters	228
1. Opportunities	228
2. Threats	228
3. Sales Strategy	228
4. Product and Business Strategy	229
XII. Glossary and Questionnaires	231