Where do you find Gravure?

Everywhere!
Competitive Climate
(According to Harvard Business School)
Label

“Offset and Flexo has kicked Gravure’s ass!”

Growth over the last decade for gravure printed labels has primarily occurred in the shrink sleeve market.

Large volume beer cut and stack and pressure sensitive labels.

Combination printing in some of Health and Beauty label segments.
Digital is Growing in Labels & Packaging

Active Install Base of Digital Printers
WW 1999-2010

CAGR 99-10 = 31%
Digital Printing has a way to go

Comparison of Printing Technologies v. Run Length

Digital

Flexo

Gravure

Aggregate Performance includes:
- Speed
- Image Quality
- Width
- Reliability
- Spot Colors
- Infrastructure/Accessories

Run Length
What can change the dynamic for Gravure in Label Printing

Press-side Engraving
  Faster
  Cheaper
  Better
Packaging

Tobacco
Baked Goods
Coffee
Pet-food
Confectionary
Consumer Goods
North American Market

300 billion cigarettes were purchased in the United States in 2011 (Almost 7 Trillion Globally)

Confectionary (Sugar and Chocolate) sales $30 billion (up by 3% from 1990)

Snack foods trending a 10% growth, reaching $77 Billion in 2015
Functional Packaging

“Intelligent packaging is an emerging technology with many potential intersections with flexible packaging and pressure sensitive materials business segments. Printed electronics could become a component of every package we manufacture.”

Bemis
Critical Aspects of Functional Printing

• The Right Process
• Printed ink thickness
• Printed ink consistency
• Printed ink detail
• Curing
Product Gravure

Dependent on the Housing Market (Improving)
House prices are back to 2003 levels
Low Mortgage Rates (If you can get one!)
Exports of Wall Coverings expanding
From 2011 Flooring added additional USA
Gravure print capacity (More to come next year)
I guess these Gravure Guys did not go to Harvard!

Six new presses were purchased in 2012, more purchased and installed in 2013/2014

Introducing higher efficiencies to all areas of the Gravure Process

Making Gravure Projects more viable

Offering the market integrated solutions

Seeking out new markets for Gravure
Publication Gravure

Decline in the market for Printed magazines

Catalogs under pressure from on-line equivalent

Sales inserts and flyers, still effective advertising

Focus on multi-platform solutions
So where are the careers?

Massive growth in developing markets

Need for technology skills in multi-platform solutions

Quantum leap in manufacturing technology will require different skills
YESTERDAY
Yesterday’s Press
Gravure Presses Of Today!
New Markets await

Interactive Magazines

Integrated electronics

Functional printed surfaces

Track & Trace Labeling
Flexible Printed Electronics

A much broader range of applications based on flexible substrates

- Printed electronics
- Electrophoretic, electrochromic, electrowetting displays
- Printed memory
- Sensors
- OLED lighting
- Thin film PV/O-PV
Authentication

Product Authentication and Brand Loyalty Program by touching packaging
Gravure will evolve

New Generation Press-side engraving

Non metallic engravings challenge Flexo

Laser technology gets faster and better

Gravure’s traditional edge finds new markets
Gravure Assets will continue to be deployed

As some markets shrink, others rise up to take their place

There will be a continued growth in packaged product

Simulated natural products increasingly utilized
Gravure Association of the Americas

The Mission of the Gravure Association of the Americas is to promote the growth of Gravure.

To this end we need to demonstrate and market the advantages of the process, and promote operational efficiencies and process improvements

www.gaa.org