

Packaging and the Brand Owner: Europe

Project Director:	Robert Leahey, Associate Director, Functional and Industrial Printing Service
Senior Advisors:	Ron Gilboa, Director, Functional and Industrial Printing Service Jeff Hayes, President, InfoTrends
Creative Services:	Chris Pesko, Desktop Publisher Kara Hanlon, Desktop Publisher Megan McCarthy, Primary Research Analyst
Editorial/Proofreading:	Mark DiMattei, Corporate Editor

This report is copyrighted by InfoTrends and is made available to a limited number of clients subject to the following conditions:

InfoTrends retains all rights to this report in its entirety.

Reproduction and/or disclosure in whole or in part to parties other than the InfoTrends client to whom the document was originally sent is prohibited without the express written consent of InfoTrends.

This report should be treated as confidential and proprietary for internal use only.

The information is believed to be accurate and reliable, but cannot be guaranteed to be correct or complete.

Table of Contents	
Executive Summary	5
<i>Key Findings</i>	10
<i>Recommendations</i>	10
Project Objectives	11
Methodology	12
Definitions	14
<i>Applications</i>	14
<i>Digital Print Technologies</i>	17
Research Findings	21
<i>Central Themes from the Research</i>	21
Sustainability is a Huge Driver for Packaging Decisions	21
Marketing and Efficiency Goals Increase Short Run Printing	21
Exclusivity is a Universal Goal of Brand Owners	22
Brands Want an Enhanced Engagement with Consumers	23
Food Information is Important, Sensitive, & Influential	24
Security Concerns Drive Packaging Strategies for Pharmaceuticals	24
Source: Xeikon	25
Color Digital Printing for Corrugated is Emerging	25
Additional Themes	25
<i>Brand Owner Survey Results</i>	27
Brand Owner Demographics	27
Packaging and Label Usage—Information Sources	32
Needs and Challenges Affecting Packaging Decisions	38
Use of Electronic Media, Security Options	44
Corrugated Media Use	48
Awareness, Use of Color Digital Printing	51
Versioning, Personalization, and Hard Copy Prototyping	61
Premium Features and Services	66
<i>Converter Survey Results</i>	68
Applications Served	68
Converter Demographics	69
Printing Equipment, Operations	72
Information Sources	74
Needs Causing Brands to Order Short Runs	76
Equipment Used for Prototypes and for Short Runs	77
About Non-user of Color Digital Presses	79
Most Valuable Features of Digital Printing	81
Purchases of Digital Printing, Use of It	83
Causes of Slowdowns for Digital and Analog Presses	87
Digital Print's Share of Revenues	88
Biggest Industries for Short Run Printing	89
Needs for Improvement in Color Digital Printing	90
About New Generation of Bigger Digital Presses	92
Brands' Needs For Security Features	95
Brands' Use of New Electronic Features	97
Features, Services Brands Will Pay Extra For	98
Prototype Printing	100

Pre-Press Topics	101
InfoTrends' Opinion	103
Appendix	104
<i>Food Safety Guidelines</i>	104
<i>Structured Survey Questionnaire</i>	105

List of Figures & Tables

Figure 1: Needs Most Likely To Cause New Designs for Packaging, Labels	7
Figure 2: Features and Services for Which Brand Owners Will Pay a Premium	8
Figure 3: Improvements Needed in Color Digital Printing (Means)	9
Table 1: Companies Interviewed	13
Figure 4: Primary Label Example	14
Figure 5: Folding Carton Examples	15
Figure 6: Flexible Packaging Examples	16
Figure 7: Corrugated Printed By Litho Print Lamination	16
Figure 8: Xeikon 3300 with Finishing, EP Color Digital Press Example	17
Figure 9: EFI Jetrion 4900, Inkjet Color Digital Press Example	17
Figure 10: Mimaki CJV30 Series, Wide Format Printer Example	18
Figure 11: Primera CX 1200 Tabletop Color Label Printer Example	19
Figure 12: Example of Direct-to-Shape Print of Metal Cans	20
Figure 13: Tonejet Color Print Engine Operating In-line With Can Manufacturing	20
Figure 14: 2013 Update to Branded Sardine Packaging	21
Figure 15: Foiling and Augmented Reality Examples	22
Figure 16: Example of Laser Cutting and Digital Creasing by Highcon Euclid	23
Figure 17: Photo of 'Share-a-Coke' Label (2013)	23
Figure 18: Scanning of Serialized Food Code Printed by Binary Array Continuous Inkjet	24
Figure 19: Sample of Serialized 2D Code for Medical Packaging	25
Figure 20: Retail-ready Package & Photo of HP Scitex 10000 Flatbed	25
Figure 21: Photo of Distinctively Shaped Containers	26
Figure 22: Which best describes your functional area at your company? (Q. 80)	28
Figure 23: Which of the following best describes your company's vertical industry? (Q. 81)	29
Figure 24: How many people are there in your whole company? (Q. 84)	30
Figure 25: In which country is your company headquartered? (Q. 82)	31
Figure 26: Which of the following...packaging or labels do your products require? (Q. 7)	32
Figure 27: For decisions at your company about the printing of packaging or labels, how influential are the following...? (Q. 8)	33
Figure 28: Please rate the following possible sources of information for your company about developments in packaging innovation and technology. (Q. 9)	34
Table 2: Main Trade Shows Cited by European Brand Owners in the Survey	35
Table 3: Main Trade Magazines Cited by European Brand Owners in the Survey	37
Figure 29: Which of the following NEEDS are the most likely to cause your company to make new or different designs for packaging or labels? (Q. 12)	38
Figure 30: Which of the following is the greatest challenge for your brand right now? (Q. 13)	39
Figure 31: How much do you agree or disagree with the following statements...on sustainability? (Q. 14)	40
Figure 32: How much would you agree or disagree with the following statements about your company? (Q. 15)	41
Figure 33: Over the next two years, how much growth do you think there will be in the printing of short runs for your company? (Q. 16)	42
Figure 34: Rate the importance of the following printing capabilities, when choosing a packaging or label converter? (Q. 17)	43

Figure 35: Does your company use or plan to use any of the following to connect with consumers electronically? (Q. 18)	44
Figure 36: Does your company design or plan to design any of its packaging or labels specifically to support your marketing online, or through mobile phones? (Q. 19)	45
Figure 37: Does your company incorporate or plan to incorporate any of the following technologies into its packaging? (Q.20)	46
Figure 38: Does your company print any of the following special security features on its packaging or labels? (Q.21)	47
Figure 39: Does your company use or plan to use any of the following color printing of corrugated? (Q.22)	48
Figure 40: For what applications does your company use or plan to use color printing of corrugated? (Q.23)	49
Figure 41: For your brand, how much do you think the color printing of corrugated will grow over the next two years, for the following? (Q.24)	50
Figure 42: Are you aware of the full color digital press technology that is now used by many converters to print labels or packaging? (Q. 25)	51
Figure 43: Which statement best describes your own label and packaging converters' use of full color digital presses? (Q.26)	52
Figure 44: For which of the following do your converters at least sometimes use full color digital presses to print jobs for your company? (Q.27)	53
Figure 45: Do your converters use color digital presses to print just prototypes or free samples, just short production runs for use with products that your company markets, or both? (Q.28)	54
Figure 46: For which applications do your converters use color digital presses to print short production runs? (Q. 29)	55
Figure 47: For which applications do your converters use color digital presses to print prototypes and samples? (Q. 30)	56
Figure 48: Which of the following are reasons why your converters do not use any color digital printing to print jobs for your company? (Q. 31)	57
Figure 49: How familiar are you with the printing technologies used to create packaging or labels for your brand? (Q. 32)	58
Figure 50: How are short runs printed for your company now, such as less than 10,000 labels or less than 5,000 packages? (Q. 33)	59
Figure 51: Regarding the safety of printed packaging for consumers, does your company have any level of concern about the following types of inks or toners? (Please describe that level.)? (Q. 34)	60
Figure 52: Over the next two years, how much growth do you expect to see at your company in versioning to meet the following needs? (Q. 35)	61
Figure 53: Does your company EVER use any personalization for labels or packaging to support your marketing in some way? (Q. 36)	62
Figure 54: How often do you think your company uses personalization of packaging or labels in a year, for any purpose? (Q. 37)	63
Figure 55: Which of the following does your company normally require from your converter, before approving the job for production? (Q. 38)	64
Figure 56: What share of packaging and label design work for your brand would you estimate each of the following accounts for? (Q. 39)	65
Figure 57: For which of the following services or features would your company be willing to pay a premium? (Q. 40)	66
Figure 58: Is your company ever willing to pay a premium to shorten the time needed for all pre-press activities? (Q. 41)	67
Figure 59: Which of the following does your company print as part of its converting operations? (Q. 42)	68
Figure 60: Which best describes your functional area at your company? (Q. 80)	69
Figure 61: How many people work at your location? (Q. 83)	70
Figure 62: In which country is your company headquartered? (Q. 82)	71
Figure 63: Which of the following types of printing equipment do you use? (Q. 43)	72
Figure 64: For any slowdown your company may experience in its print processes, how much of a contributor is each of the following? (Q. 44)	73
Figure 65: Please rate the following possible sources of information for your company about developments in packaging innovation and technology. (Q. 45)	74

Table 4: Main Trade Shows Cited by European Converters in the Survey	75
Figure 66: Which of the following needs do you think are the most likely to cause your customers to make new/different designs for packaging or labels? (Q. 47)	76
Figure 67: What printing equipment do you use to print PROTOTYPES or TEST RUNS of labels or packaging, such as 1 to 100 copies? (Q. 48)	77
Figure 68: What printing equipment do you use to print SHORT RUNS of labels or packaging for use with products that are SOLD AT RETAIL? (Q. 49)	78
Figure 69: Regarding full color digital presses such as Durst, Epson, HP Indigo, Jetrion, Xeikon, which best describes your company? (Q. 50)	79
Figure 70: What type of color digital press have you considered or are you considering? (Q. 51)	80
Figure 71: Which of the following are reasons why you have never considered them? (Q. 52)	81
Figure 72: What features or uses of color digital printing are most valuable? (Q. 53)	82
Figure 73: Do you ever buy color digital printing from an outside company, maybe to print short runs? (Q. 54)	83
Figure 74: Which of the following label or packaging applications do you print or plan to print with a color digital press? (Q. 55)	84
Figure 75: Do you use color digital presses to print just prototypes or free samples/just short production runs for use with products that customers market?	85
Figure 76: Applications Printed on Color Digital Presses—Short Runs vs. Prototypes (Q. 57 & 58)	86
Figure 77: Problems Most Likely to Slow Print Jobs on Different Presses (Q. 59 & Q. 60)	87
Figure 78: What share of your total revenues does printing on color digital presses account for the following applications? (Q. 63)	88
Figure 79: Which of the following industries will be the biggest sources of short print runs for your company over the next 12 months? (Q. 64)	89
Figure 80: Regarding color digital printing, how much need is there to improve each of the following, in order to meet the needs of brand owners? (Q. 65)	90
Figure 81: Regarding the safety of printed packaging for consumers, do your customers have any concern about the following types of inks or toners? (Q. 66)	91
Figure 82: Assuming the presses print well, how would you rate the possible usefulness of these bigger presses for printing? (Q. 67)	93
Figure 83: Regarding a new color digital press for folding cartons, one capable of printing B2-sized images, which media format would you prefer it to use? (Q.68)	94
Figure 84: Do your customers require any special security features for use with their packaging or labels? (Q. 69)	95
Figure 85: What special security features are or will be required by your customers? (Q. 70)	96
Figure 86: Do your customers incorporate any of the following into their packaging or labels? (Q. 71)	97
Figure 87: Features and Services That Command Premium Prices (Q. 72 & Q. 40)	99
Figure 88: On average, how many prototypes do customers order before approving one label print job, or one packaging print job? (Q. 73)	100
Figure 89: What is the smallest savings in pre-press time for which your customers would pay a premium? (Q. 76)	101
Figure 90: Does your company offer any of the following pre-press services? (Q. 78)	102
Table 5: Sources of Key Guidelines on Food Safety	104