

WhatTheyTh!nk

Technology Outlook Week
LABELS AND PACKAGING

David Zwang

September 9, 2025



GET THE MOST OUT OF THIS WEBINAR...

- Send us your questions during the webinar
 - Use the Q&A box instead of Chat box to ask questions
- Video and audio archive will be available later today along with PDF of slides

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TECHNOLOGY AND THE PACKAGING REVOLUTION

Market Shifts

Labor
Challenges

Digitalization

Sustainability

Connected
Process
Automation

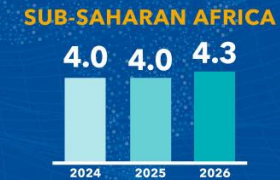
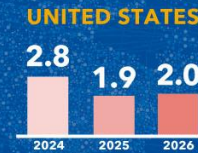
Other

- Tariffs
- Regional Conflicts
- Energy Costs

GLOBAL ECONOMIC DRIVERS

WORLD ECONOMIC OUTLOOK UPDATE JULY 2025 **GROWTH PROJECTIONS BY REGION**

(REAL GDP GROWTH, PERCENT CHANGE)



IMF.org/pubs

Source: IMF, *World Economic Outlook Update*, July 2025.

Note: Order of bars for each group indicates (left to right): 2024, 2025 projections, and 2026 projections.

RECORD EXPANSION OF CONSUMERISM

The middle class will spend
\$29 trillion more per year by 2030

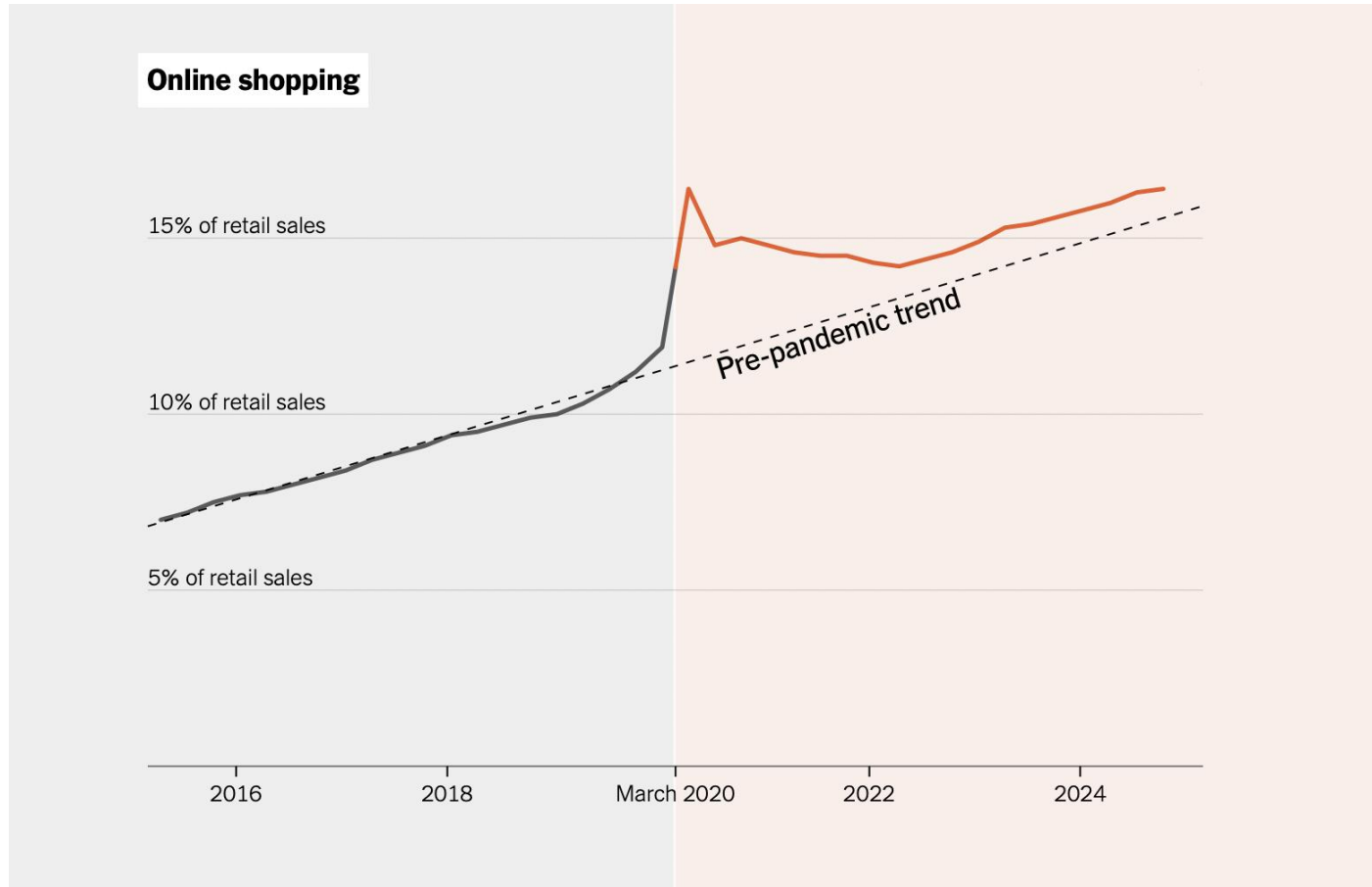
Globally, the middle class is already spending \$35 trillion, and could spend \$29 trillion more by 2030, accounting for roughly 1/3 of the global economy. The market for middle class consumption could grow faster than global GDP growth.



*per year in real terms

BROOKINGS

CONSUMER PURCHASING HABITS



- Driving Development
- Projected 24% of retail in 2025
- 85 % Global Consumers

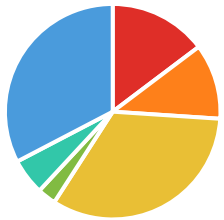
- Shifting buying habits
- SKU Proliferation

© New York Times 2025

PROJECTED GLOBAL GROWTH

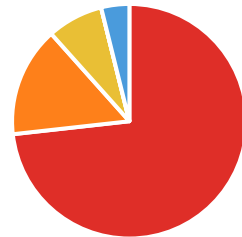
- Labels 13.41% 2022 – 2027
- Folding Carton 14.38% 2022 – 2027
- Flexible Packaging 17.80% 2022 – 2027
- Corrugated 13.79% 2022 - 2027

Relative Label Growth Rates by Technology



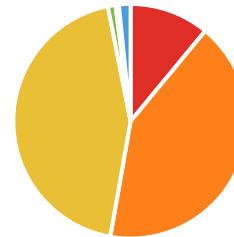
Offset litho Gravure
Flexo Screen
Other analogue Digital

Relative Carton Growth Rates by Technology



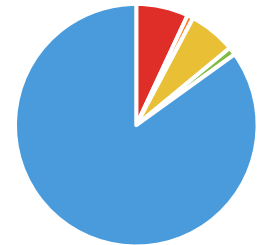
Offset litho Gravure Flexo
Screen Other analogue Digital

Relative Flexible Packaging Growth Rates by Technology



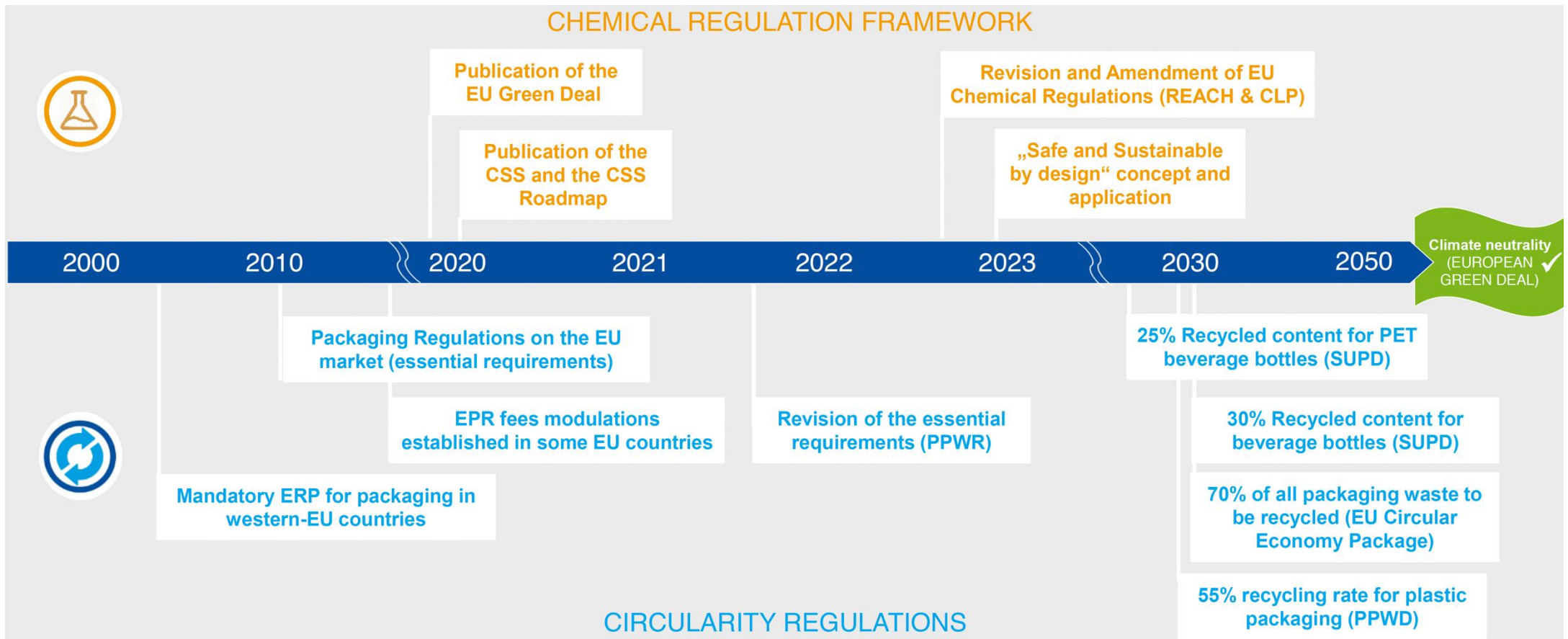
Offset litho Gravure Flexo
Screen Other analogue Digital

Relative Corrugated Growth Rates by Technology



Offset litho Gravure Flexo
Screen Other analogue Digital

SUSTAINABILITY MORE THAN JUST A GOOD IDEA



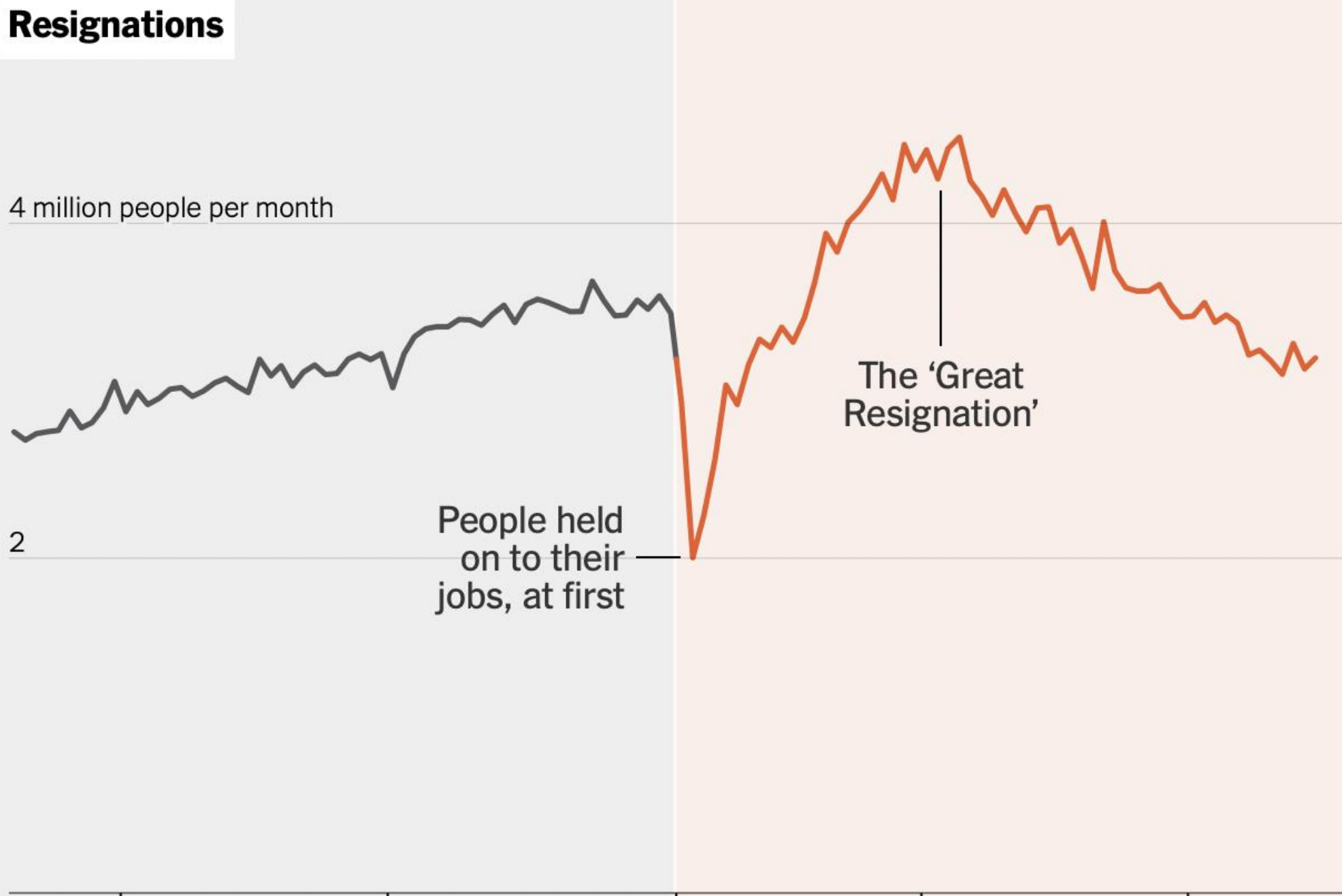
Resignations

4 million people per month

2

People held on to their jobs, at first

The 'Great Resignation'



DRIVING AND TRANSFORMING PACKAGING WITH TECHNOLOGY



DIGITALIZED FLEXO



© Omet iFLEX



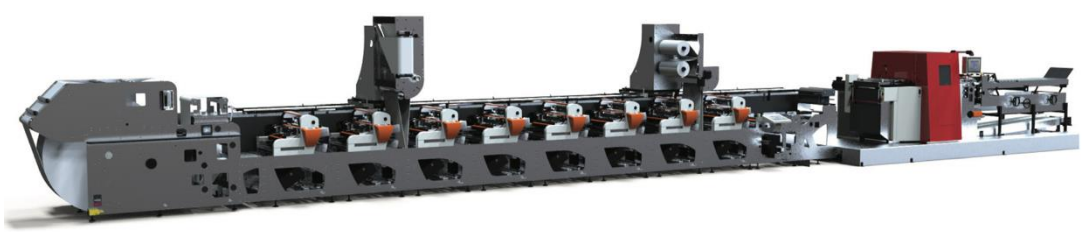
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EP - LABELS



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© SCREEN L350UV SAI



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INKJET - LABELS



© Canon LS2000



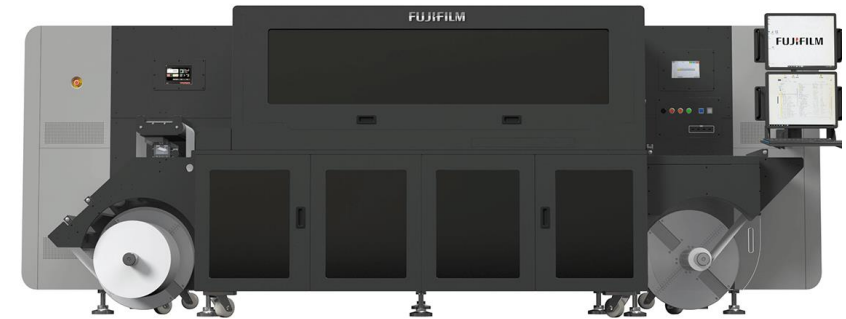
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© Bobst Digital Expert 340



© Fujifilm LP350

HYBRID/ALL IN ONE - LABELS



© Mark Andy Digital One



© Bobst Digital Master



© Gallus One



© Durst RSC

FLEXIBLE PACKAGING



© Miyakoshi MJP30 AXF



© Screen Truepress PAC



© Screen Truepress PAC 830F



© Xeikon CX500



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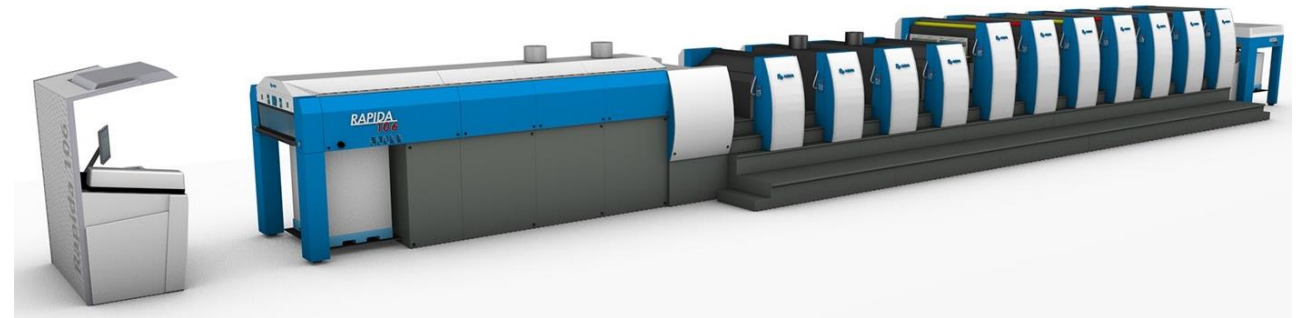


© HP 200K

DIGITALIZED ANALOG FOLDING CARTON



© Heidelberg Speedmaster



© KBA Rapida



© Komor Lithrone

INKJET - FOLDING CARTON



© Agfa SpeedSet



© KBA Durst VariJET 106



© Landa S11



© Canon iV7



© Konica Minolta AccurioJet KM1e

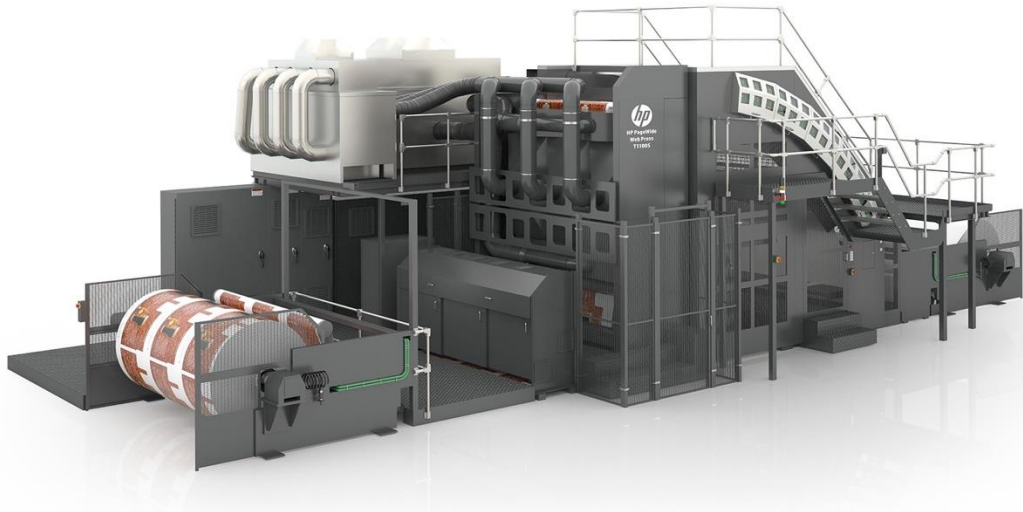


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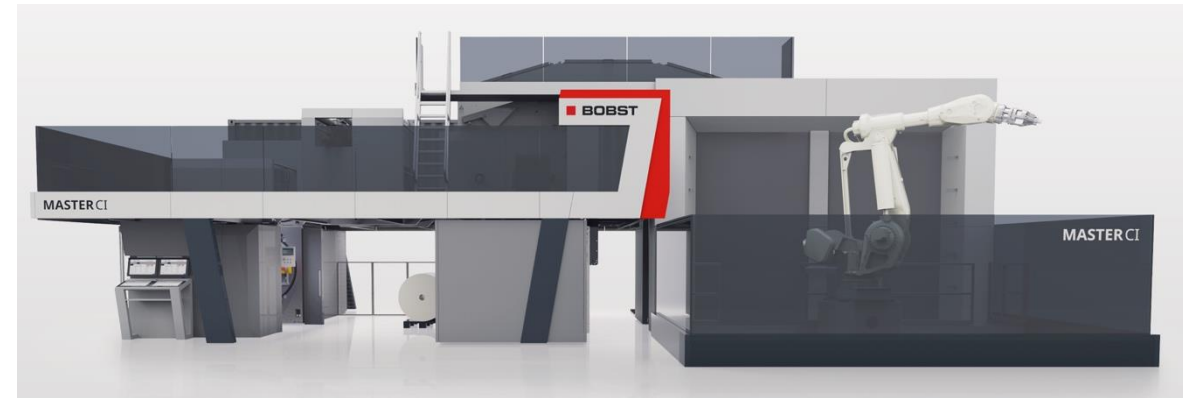


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CORRUGATED PREPRINT



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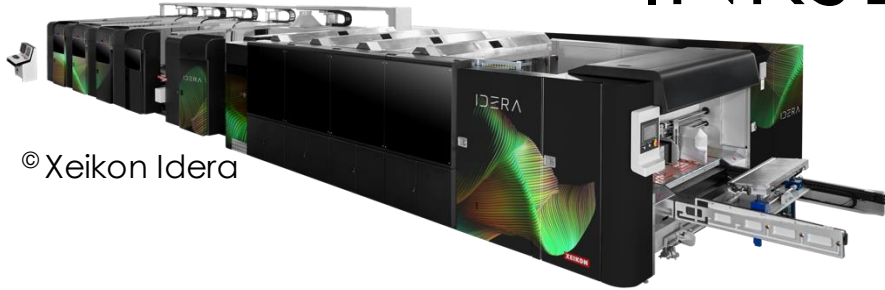


© Bobst - MasterCI



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INKJET - CORRUGATED POSTPRINT



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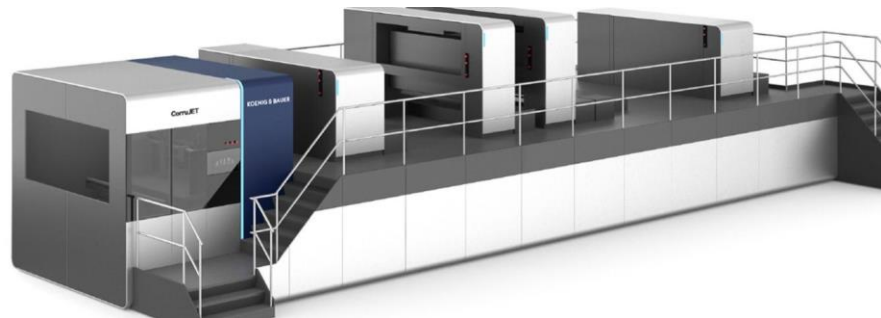
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© Canon – Coming soon



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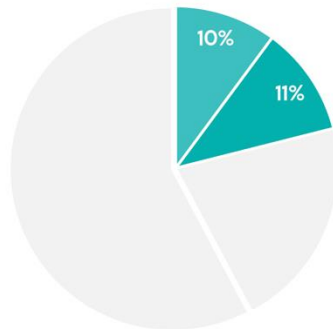
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AUTONOMOUS FLEXO FOLDING CARTON



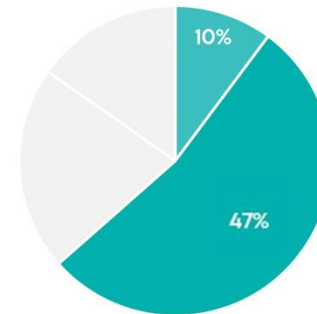
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HYBRID FLEXO CORRUGATED



Traditional digital

Barely 20% of printing volume could be efficiently transferred from HQ Flexo, just the smallest runs and low ink coverage printing



KENTO HYBRID®

More than 60% of printing volume could be transferred from HQ Flexo printers with lower costs, with big savings in plates and digital inks.

© Kento

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Achieve critical performance AND sustainability goals with a full range of water-based, repulpable, and PFAS-free coating solutions:

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- low temperature heat seal



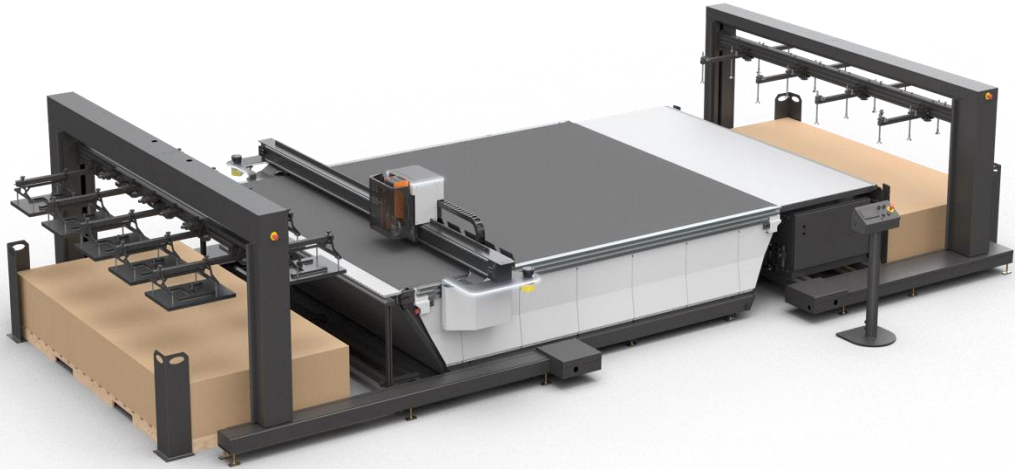
Learn more at
mchl.mn/wttweb24



CONVERTING THE PRODUCT



PRODUCTION DIE CUTTERS



© Kongsberg



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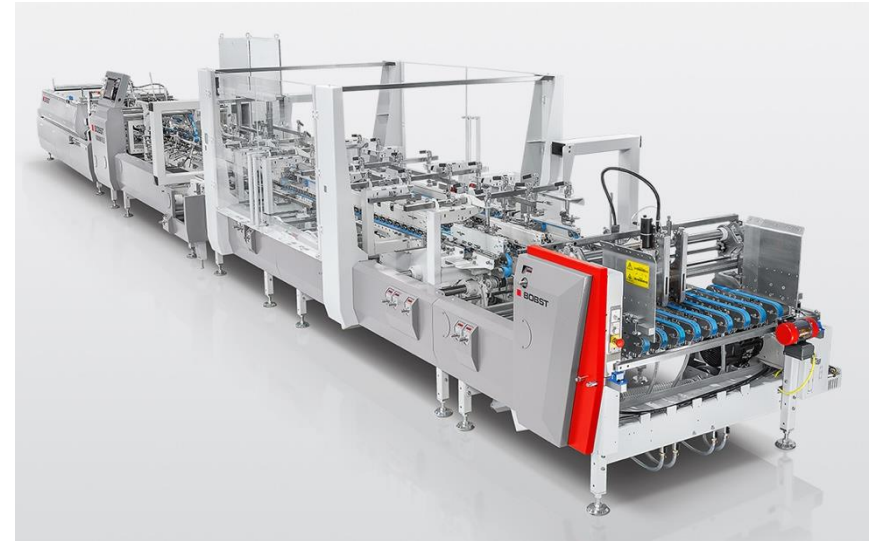


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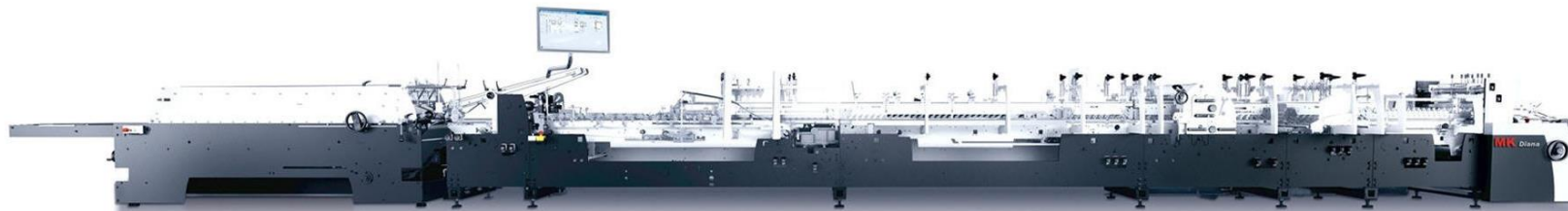
AUTOMATED FOLDER GLUERS



© KAMA



© Robst



© Heidelberg Diana Smart

APPLICATION SOLUTIONS



MGI AlphaJet



© Canon/Eddle FL5



© EFI/Packsize

CONVERTING

Even when it is a short run



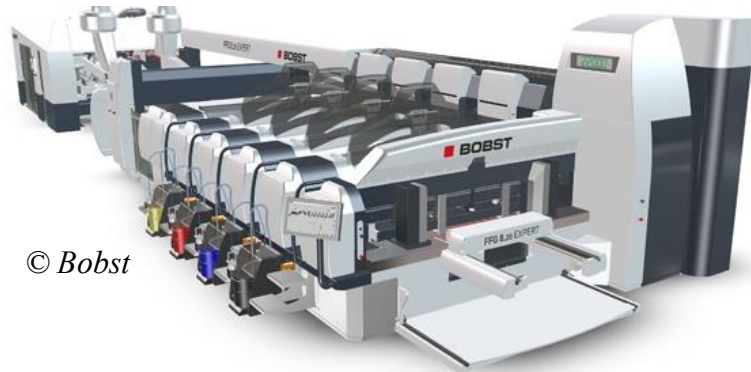
© Rollem Insignia 7



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© GM



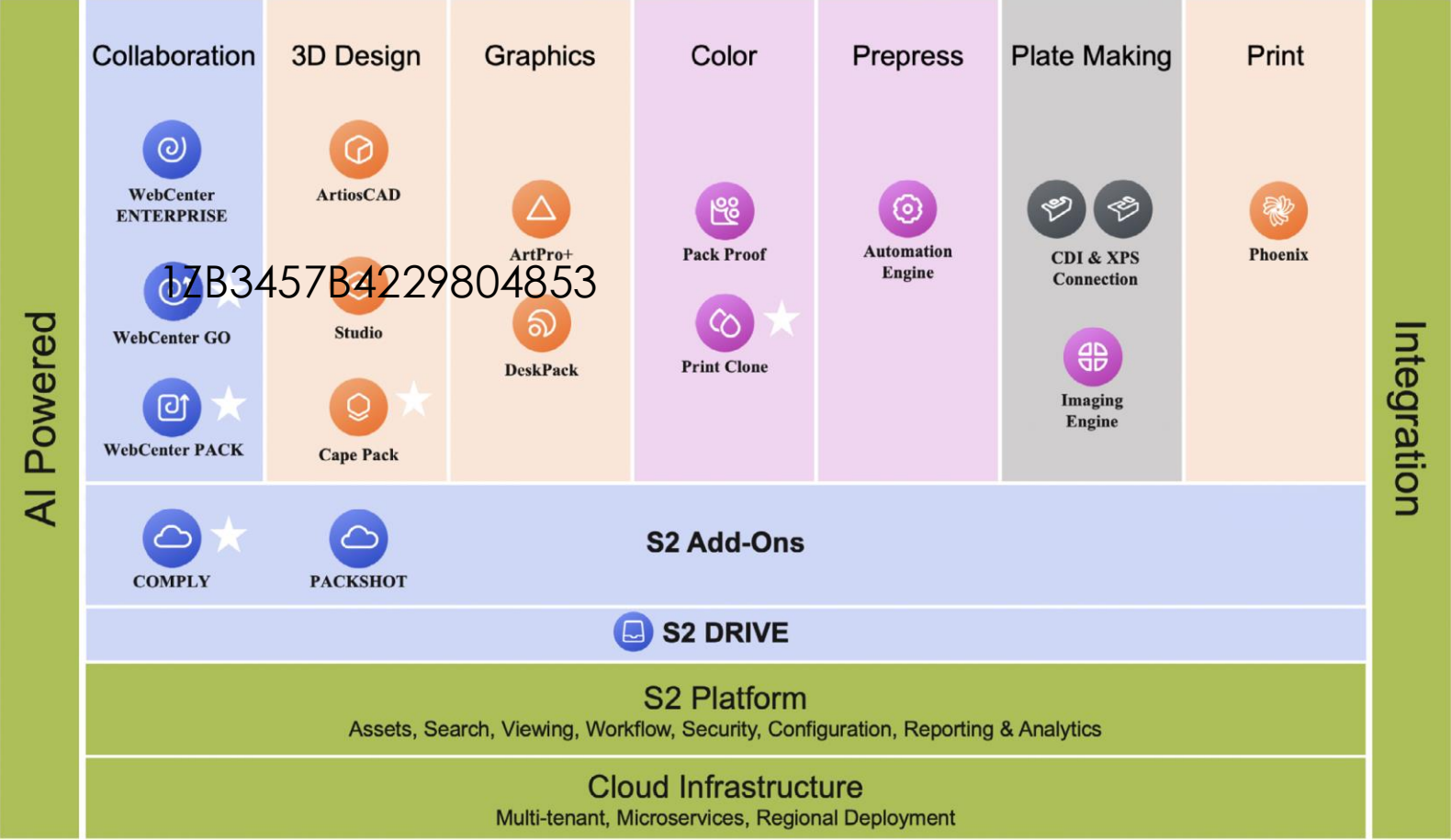
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CONNECTED AUTOMATION

In the plant and across the value chain



ESKO S2 PLATFORM



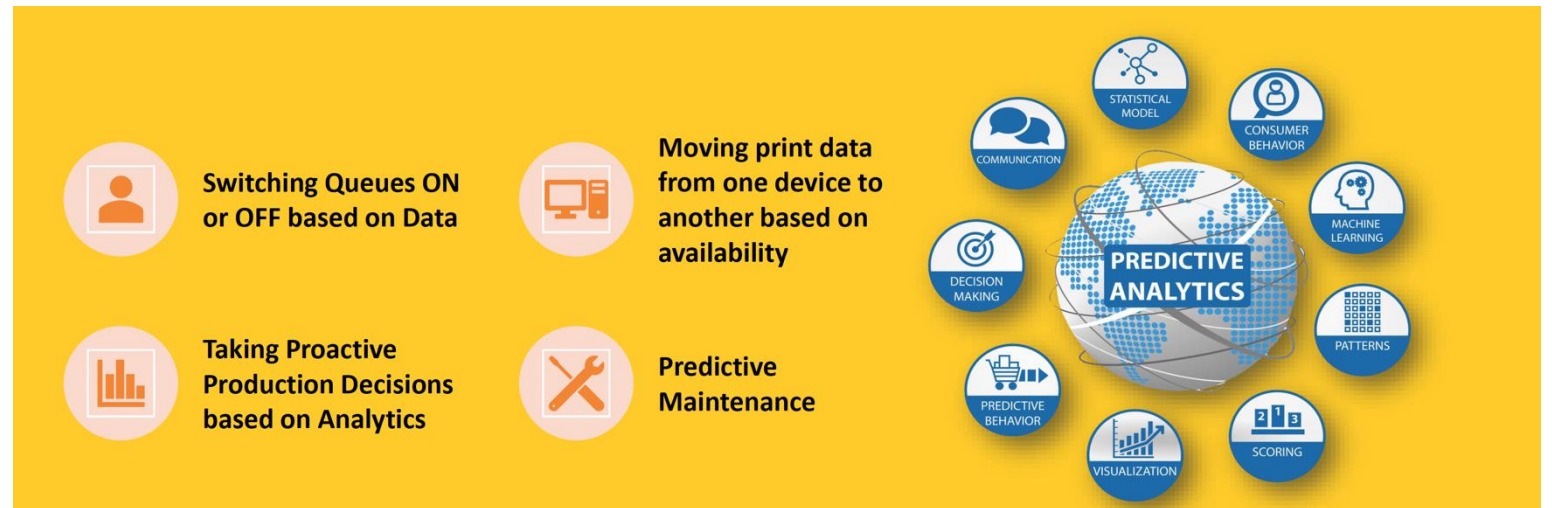
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Prinect Workflow with Prinect Touch Free.



INTELLIGENT AUTOMATION: CANON

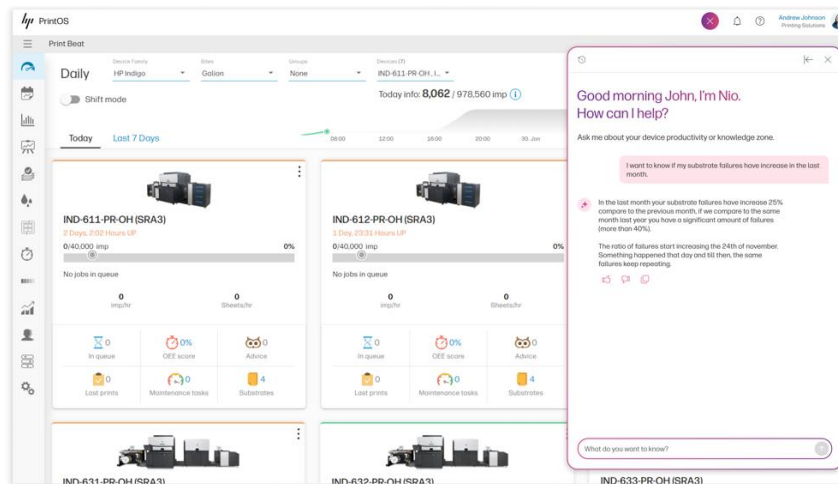
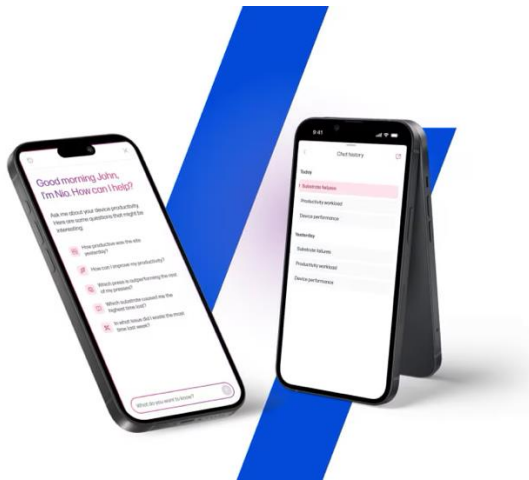
- Canon started to develop the necessary data connectivity support into their products and moved it to the cloud, providing communication between products and systems.
- Machine Integrated Intelligence
- Smart Print Room



INTELLIGENT AUTOMATION: HP NIO

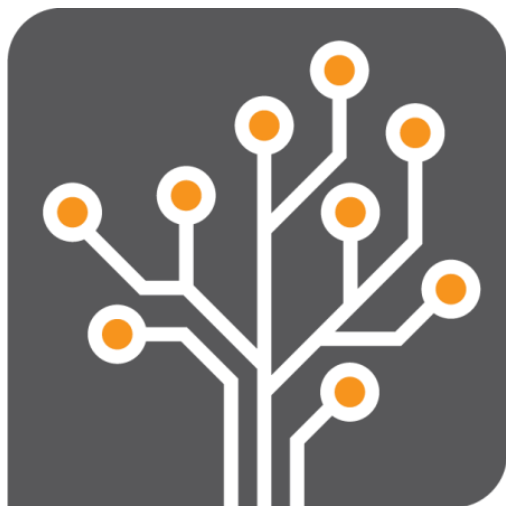
“We think intelligent automation is the combination of artificial intelligence and automation...” *Joan Perez Pericot, Head of Software for HP Industrial Print*

- HP NIO uses AI with system connected data with different subsystems to generate insights, and to take decisions to drive action, to take initiative

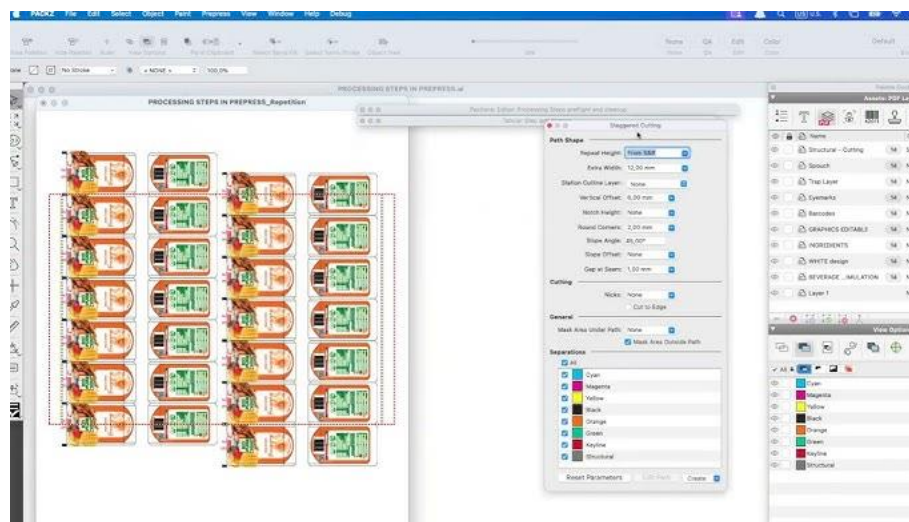


INTELLIGENT AUTOMATION: STANDARDS

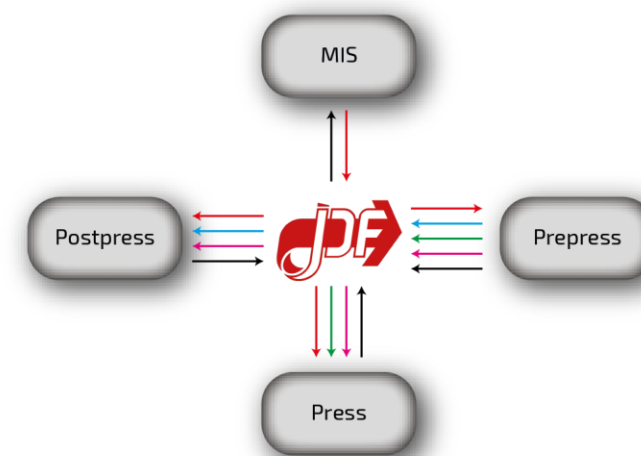
It's about Data, and without Standards it will be difficult to implement IA and AI



UNIFIED PRINTING
TAXONOMY

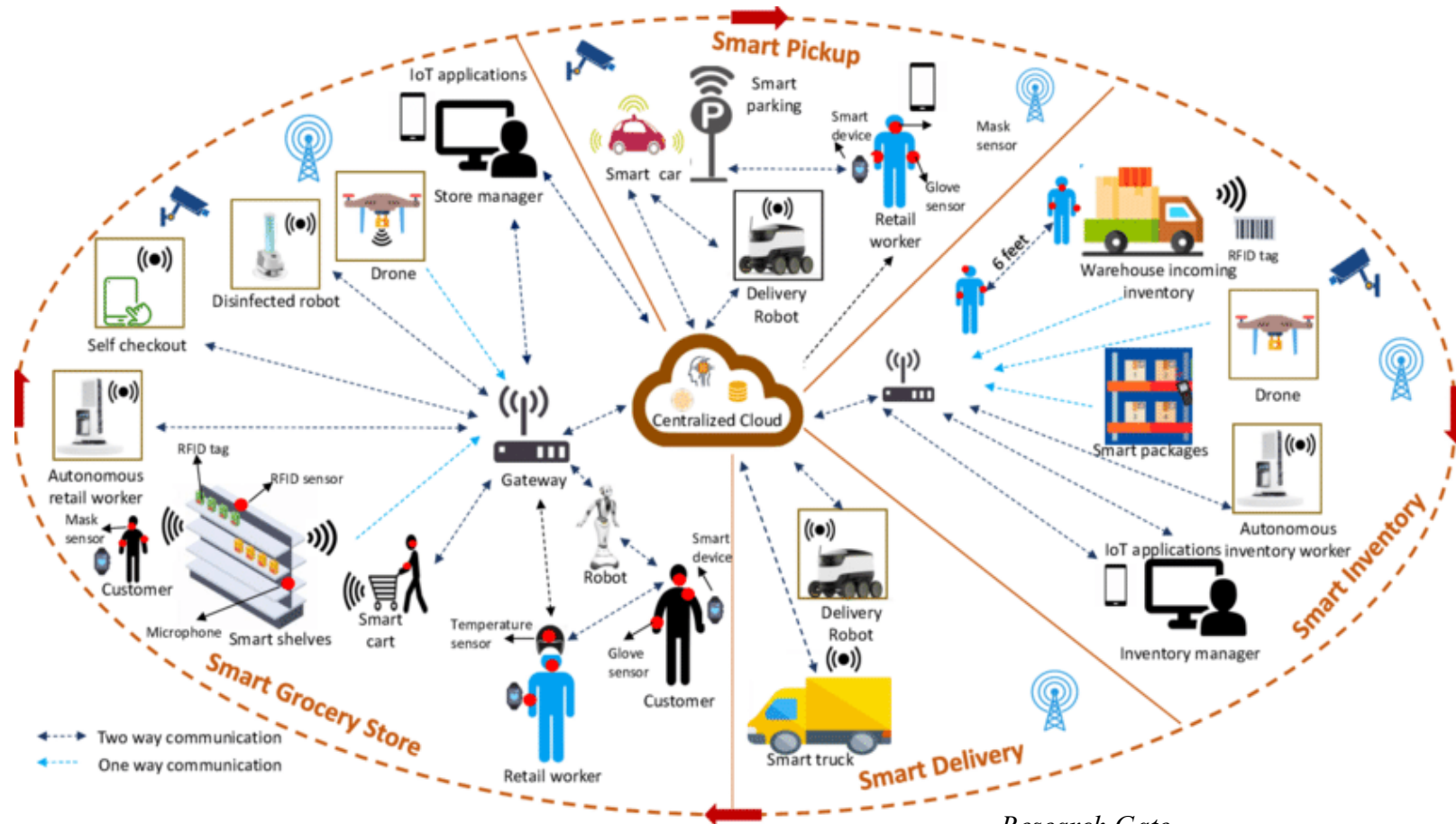


 Ghent
Workgroup



- Order ID, Customer, Page Size, Sheet Size, Colors, Printing Substrate, Run Length, Imposition Scheme,...
- Ink Zone Presting Values
- Previews
- Cutting Data, Folding Data
- Operational Data

CONNECTED SUPPLY CHAIN





infigo

WEB TO PACK

 **packly**


**boxit
now**TM

packQ

Design 'N' Buy

Canva

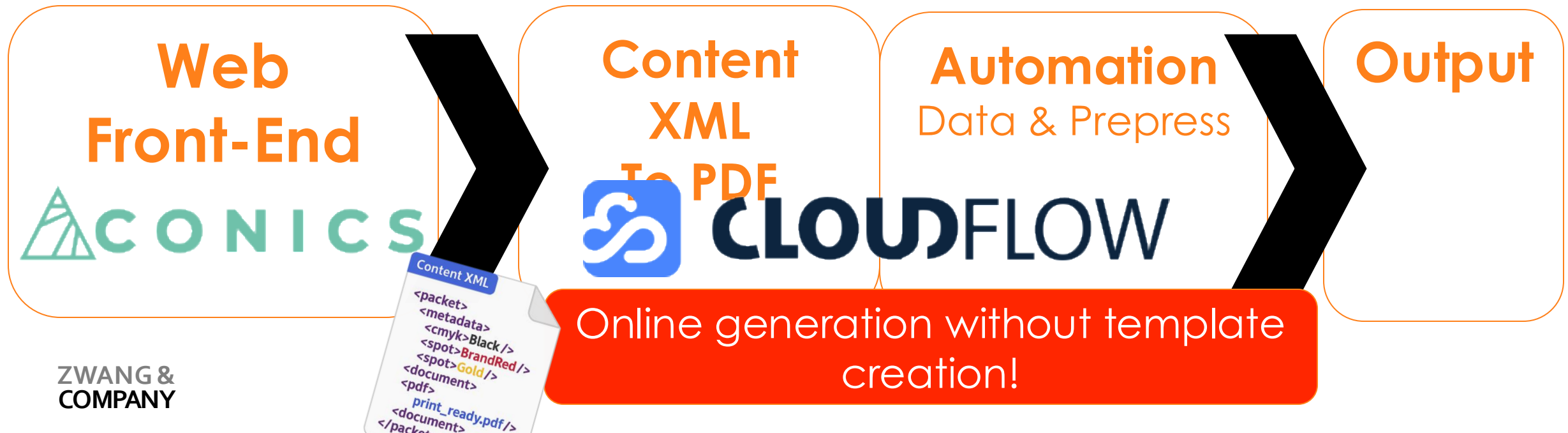


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Web2Label – Web2Print

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Partnership with Conics – online editing based on Content XML technology!



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Q&A

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questions!

UPCOMING WEBINARS

- Technology Outlook Week Continues!
 - Wednesday, September 10—Software & Workflow w/Pat McGrew and Ryan McAbee, sponsored by Durst, Fiery, and Infigo
 - Thursday, September 11—Wide-Format & Signage and Textiles & Apparel w/Richard Romano and Cary Sherburne, sponsored by EFI
 - Friday, September 12—Finishing & Embelishments w/Patrick Henry, sponsored by Tecnav

For more information and to register, visit whattheythink.com/webinars



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