

LABEL
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MASTER CLASS

FLEXIBLE PACKAGING

The Future Of Flexible Packaging

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Three things you need to know about me

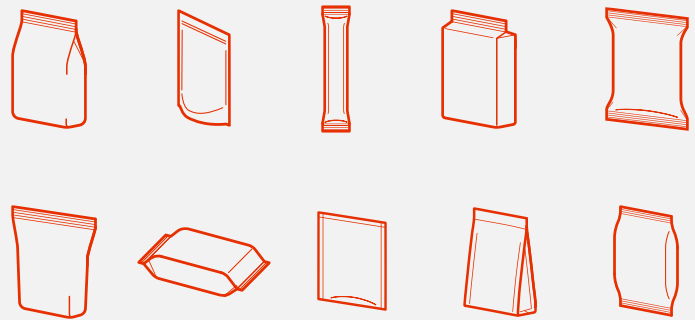
That's not me in the picture ;-)

Addicted to packaging: CLP, HP, Solutum

Supermarkets can be harmful to marriage



What is Flexible Packaging ?



A flexible package is:

a package or container made of flexible or easily yielding materials that, when filled or closed, can be readily altered shape

Flexible packaging is mostly used as:

1

Primary packaging
in direct contact with the
contents



2

Secondary packaging
used to transport primary packs
from filling stage to retail outlet



Functional, convenient and sustainable

Main applications:



Stand Up Pouch / Doypack



Flow pack / pillow bag



Sachets / stick packs



Cold Seal



Lids



Spouted pouches



Flat bottom pouches



2-side seal bags



Retort pouches

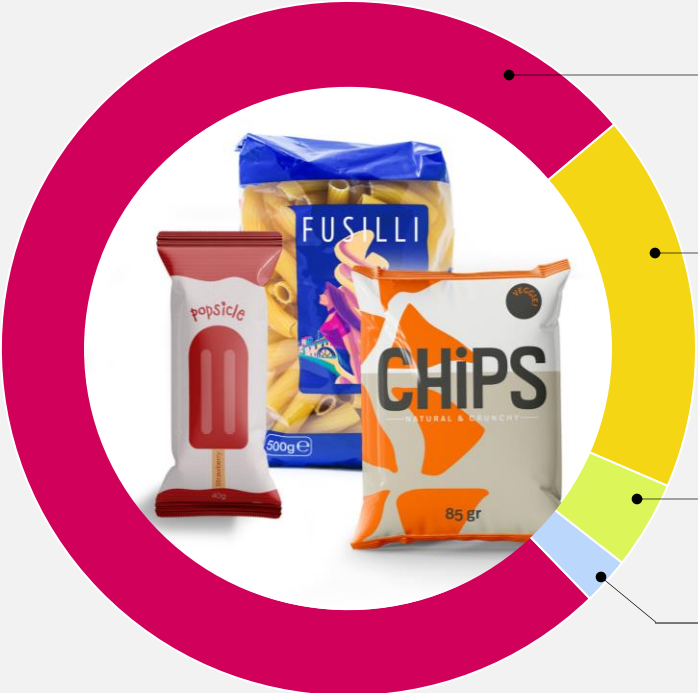


Laminate tube

Heavily focused on food and plastics



Verticals*



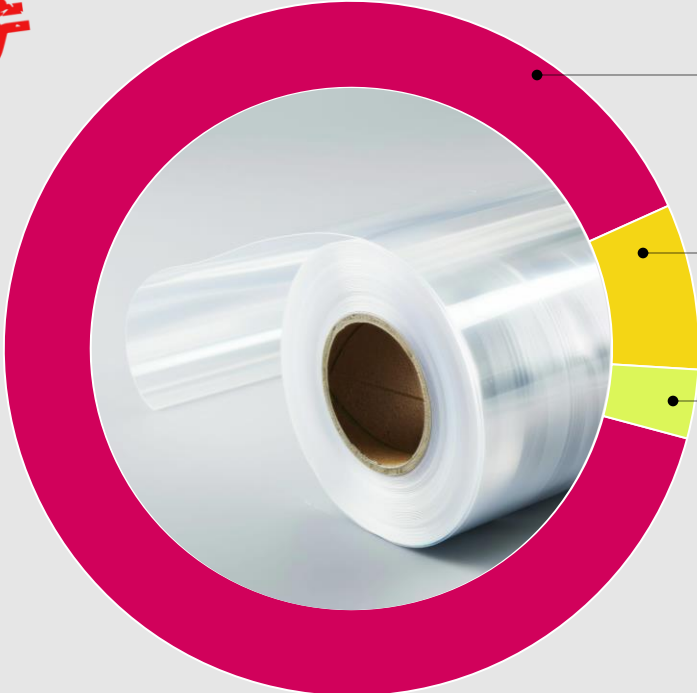
76%
Food

17.6%
Non-food

4.1%
Beverages

2.2%
Pet food

Materials*



89.1%
Plastics

7.7%
Paper

3.2%
Foil

It is a fast-growing segment

Global market

\$127B

+4% CAGR*
(2023)



US market

\$44.7B

+4.2% CAGR**
(2023)



* The Future of Package Printing to 2027, Smithers Pira
** state of the U.S flexible packaging industry report, 2023 by FPA



US flex pack market is controlled by large players

~506
flex pack
converters in
the US



* FPA 2023 State of the Industry Survey. based on U.S. Census Data compiled by Inform



Characterized by a volume-production industry

Typical production flow looks like this:

Film extrusion



Printing



Laminating



Slitting



Pouch conversion



Global trends drive packaging disruption



Sustainability



e-commerce



Personalization



Improved supply chain



Rise of small brands

SMB brands are underserved by this high-volume production



Long lead times



High MOQ of 5K-10K SQM



Customers pay for expensive plates

Creating profitable growth for early adoptors

Digital flexible packaging is the fastest growing segment in the print industry Doubling annually since 2019



1. Conventional

Adding digital to their portfolio

2. Entrepreneurs

Building from scratch around digital

3. Label converters

Diversifying into flexible packaging

Why are label converters diversifying into flex pack ?

Leverage your expertise

Expand your portfolio

Capture trends

Higher revenue and margins



Time 2 Market

Short runs

Multiple SKUs



Your customers wants flex pack too

Be that one-stop-shop



Success is based on simple math

The potential of shifting from 20,000 Pressure Sensitive Labels to 20,000 Pouches

(selling only the label)

Label 127 X 178 mm

20K Labels = 450 SQM

Possible Revenue = ~ \$1320

Possible Margin = ~ \$275

(full layout)

Pouch 660 X 220 mm 20K

Pouches = 2,900 SQM

Possible Revenue = ~ \$6,400

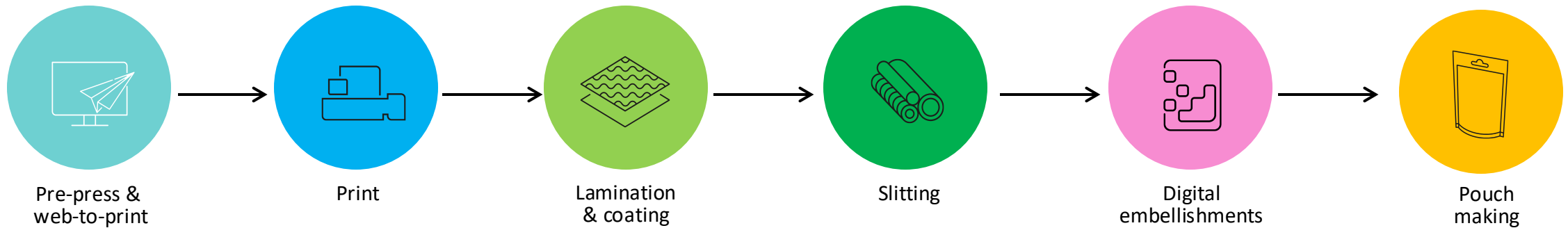
Possible Margin = ~ \$2,200

>4-6X Revenue and
nominal Margin



Lean production floor leads to a profitable growth

Go from file to pouch in days, not weeks, with the Digital Pouch Factory











 HP PrintOS	 Indigo	 	  		 
 Infigo Software		 abg International			
 XM PIE one to one in one		 PCT EBEBAM AND INTEGRATION			 LABEL ACADEMY MASTER CLASS FLEXIBLE PACKAGING
 LABLEXPO AMERICAS 2024					

The journey of success: From 0% to 60% in less than 5 years

- Founded in 2013
- Focuses on sustainability
- 2019 –Launched flex pack activity
- No MOQ, fast delivery, design service
- Currently - 60% of revenue from flex pack
- Expanding to new facility



LABELISTEN®
WIR SIND PRIVATE LABELING.

-  more space for your design
-  space-saving in logistics/transportation
-  Food-safe
-  fast delivery
-  Monomaterial recyclable
-  80% less resources
-  resealable - with zipper
-  small quantities

Diversification as a growth engine



- Founded in 1906
- 100% employee-owned company
- 2019 – first U.S provider for labels, folding cartons and flexible packaging
- Focuses on pharmaceuticals and specialty products
- Grow with existing customers to expand with new application
- Trusted advisor



Complete Packaging



CARTONS

Nosco provides a wide variety of folding carton design solutions and styles for the fit, form and function necessary to protect your products.

[Learn More >](#)



LABELS

Labels are an extension of your brand. Increase awareness, leverage years of regulatory expertise and meet quality standards with Nosco.

[Learn More >](#)



FLEXPACK

Through cutting-edge digital print technology, Nosco offers flexible packaging solutions that are an ideal fit for a variety of applications.

[Learn More >](#)



INSERTS / OUTSERTS

Nosco will deliver your folded literature, inserts, outserts, leaflets and booklets on time and in complete compliance with your brand's unique specifications.

[Learn More >](#)



MSHN PACKAGING

We're on a mission to build better direct-to-consumer mailers and shippers with streamlined components and ample branding space.

[Learn More >](#)



SPECIALTY

Nosco offers functional and attractive ways to protect, display and promote your products through a variety of specialty packaging types.

[Learn More >](#)



Why should you diversify to flexible packaging ?

Strong Demand **1**

Profitable Growth **2**

Smooth Entry **3**

Why should you diversify to flexible Packaging ?

1 Strong demand by brands

- Huge and fast-growing market
- Global trends disrupting the traditional volume-driven industry
- Brands want faster time-to-market, sustainable short runs, with no minimum order
- Strong demand for sustainable production with lower inventory and scrap levels

2 Accelerate profitable growth

- Drive X6 Revenue & Margin for pouch vs. label
- Add flex pack to your portfolio, serve existing customers and gain new ones
- Digital flexible packaging disruptors doubled their business since 2019 with ROI \geq ~2 years
- Celebrating the 400th press with double digit growth YOY

3 Smooth Entry

- Your mindset is a competitive edge: you are already set for improved production
- Same brand, same product range, become a one-stop-shop
- Digital Pouch Factory allows smooth entry to flex pack and scaling
- Keep your equipment versatile and agile to adapt to any application



Visit us at Hall D booth 3226



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Thank you