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July 2010

eReview

Center Spotlight



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Print in the Mix

Sustainability in Gravure Packaging Printing

In today's gravure packaging industry, sustainable development efforts are fueled by consumer and retailer demands for environmentally-friendly packaging products. These demands influence the production workflow of packages on multiple levels, such as the composition of materials and the implementation of printing process controls.

The primary goals of this month's survey-based research study, *[Sustainability in Gravure Packaging Printing \(PICRM-2010-06\)](#)*, by [Angelica Li](#) and [Robert Chung](#), were to assess:

- The general view of all stakeholders regarding sustainability in the gravure packaging industry,
- The specific views of various stakeholders regarding sustainability practices within their respective areas of expertise (discussed in detail in [the full monograph](#)), and
- The general views of respondents toward the development of sustainability.

Methodology & Sample

Gravure packaging stakeholders were identified through a collaboration with professional industry organizations in the United States and Europe. The Gravure Association of America (GAA) and the European Rotogravure Association (ERA) distributed this survey to their electronic mailing lists. The survey was also distributed directly to professional contacts in the gravure packaging industry through e-mail and phone-calls.

A total of 190 individuals started the survey, and approximately 63% completed all of the questions— resulting in a sample of 119 total respondents.

Print in the Mix is "a unique site demonstrating the role of print as a viable information medium in the marketing mix." This **free** resource is published by the Printing Industry Center.

Sample Fast Fact:

*According to a study by Salted Services, a company whose product tests and measures e-mail marketing campaigns. **more than 50% of e-mail recipients delete marketing messages within two seconds of opening them.***

[Read the full fast fact here.](#)

Have you visited **Print in the Mix** yet? Find out how this site can help you 'make the case' for print!

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Industry Education & Training

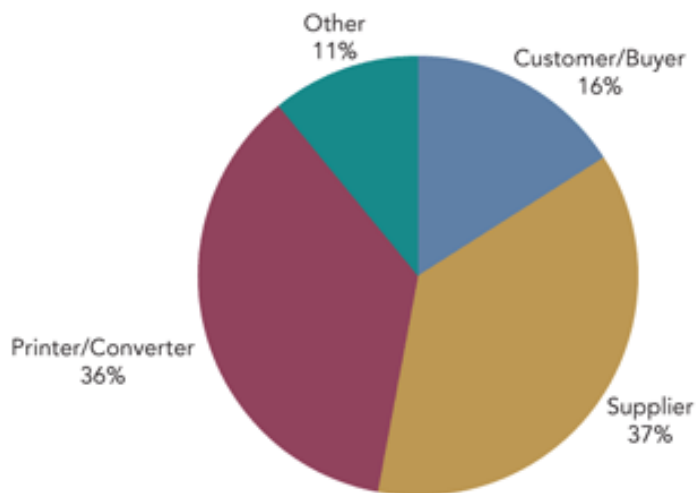
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Our programs and services can help your organization make the most profitable use of new technologies, enhance productivity, boost customer satisfaction and produce a healthy bottom line.

Upcoming industry education programs include:

As shown in Figure 1, the majority of respondents were Printers/Converters and Suppliers. The **Customers/Buyers** category includes those who are purchasing or seeking print services. **Suppliers** include those providing printers and converters with materials and equipment. **Printers/Converters** include the companies producing the final product that will be distributed to consumers. The **Other** category consists of responses mainly from those involved in educational institutions as well as a few from design and premedia services.

Figure 1. Respondents by stakeholder category
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Knowledge of Sustainability

When asked how familiar they were with the issue of sustainability within gravure packaging printing, 62% of respondents feel that they are Moderately Familiar or Very Familiar.

Figure 2. Familiarity with sustainability by respondent category
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About the eReview

The *eReview* is a monthly publication of the Printing Industry Center at RIT for registered Affiliate companies. Articles are also published in the quarterly printed publication *PrintReview*.

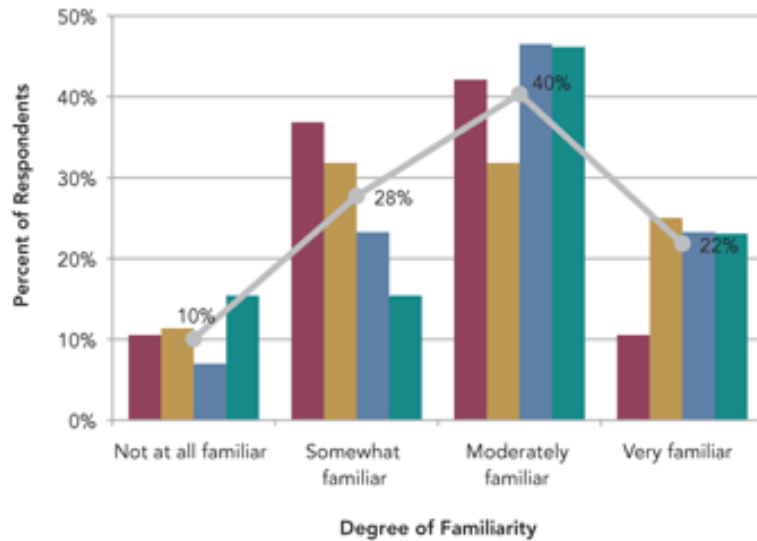
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Of the 22% that are Very Familiar with sustainability, only 11% of Customers/Buyers selected this choice. This indicates that customers and buyers of gravure packaging may need more education and training in sustainability.

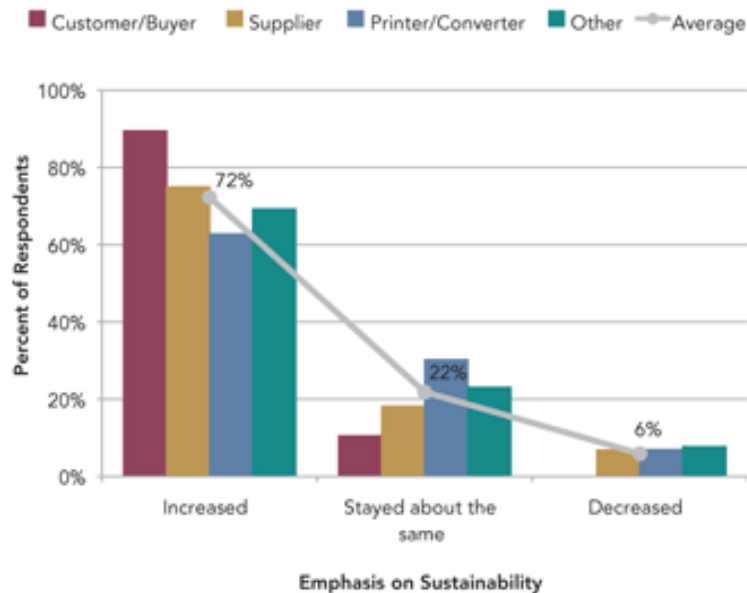
Emphasis & Areas of Importance

When asked if the emphasis on sustainable printing within the past year has increased, stayed about the same, or decreased in importance, 72% of respondents say that it has increased.

For Customers/Buyers, the majority (89%) feel that the emphasis on sustainability has increased, and none felt that it has decreased.

Figure 3. Emphasis on sustainability within the past year by respondent category

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When asked about the top three areas of importance in terms of

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About the Center

Dedicated to the study of major business environment influences in the printing industry precipitated by new technologies and societal changes, the Printing Industry Center at RIT addresses the concerns of the printing industry through educational outreach and research initiatives.

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sustainability, the results were (1) Competitive quality and pricing, (2) Efficient use and conservation of material resources, and (3) Management of waste and pollution.

Figure 4. Areas of importance for sustainability in gravure packaging

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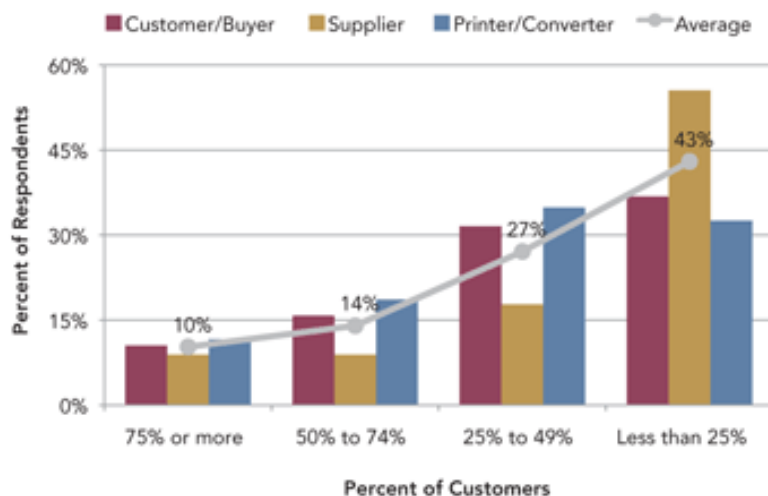


Customer Behavior

All respondents were asked: What percentage of your current consumers are seeking sustainable products and services from your company? An average of 24% said that 50% or more of their customers are seeking sustainable products and services. However, for a larger portion of companies, it is less than a quarter of their customers.

Figure 5. Percentage of customers seeking sustainable products and services by respondent category

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Environmental Concerns

Respondents were asked to select the top three environmental concerns they consider to be most important.

Customers/Buyers take these issues into consideration in their print supplier evaluation. The most important issues were recycled

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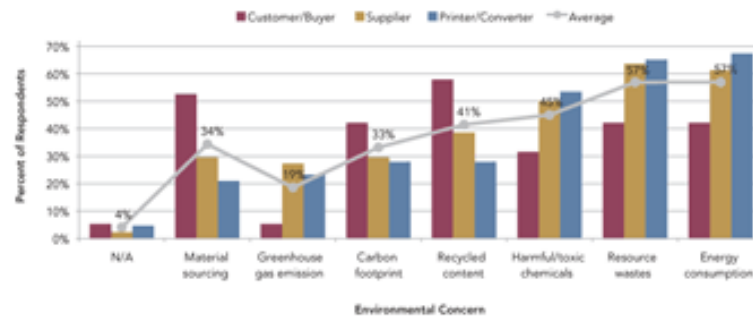
[VIGC](#)

[Xerox Corporation](#)

content and material sourcing. Only 5% of Customers/Buyers felt that greenhouse gas emissions were among the top three concerns.

There was a difference in concerns among stakeholder groups. Recycled content and material sourcing are very important to Customers/Buyers, with 58% and 53% respectively considering them as top three concerns. This is likely due to the marketing strategies for "green-printing" that promote eco-friendly materials (recycled content, forest stewardship, etc.).

Figure 6. Environmental concerns by respondent category
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However, for Suppliers and Printers/Converters, recycled content and material sourcing are not among the top three concerns. Instead, the top concerns for Suppliers and Printers/Converters are resource wastes, energy consumption and harmful/toxic chemicals. These issues are more directly related to their production-based activities.

Sustainable Printing Challenges

Customers/Buyers were asked: What are the top three challenges to obtaining sustainable printing from the packaging printing supply chain? Suppliers and Printer/Converters were asked: What are the top three challenges in making processes/products more sustainable?

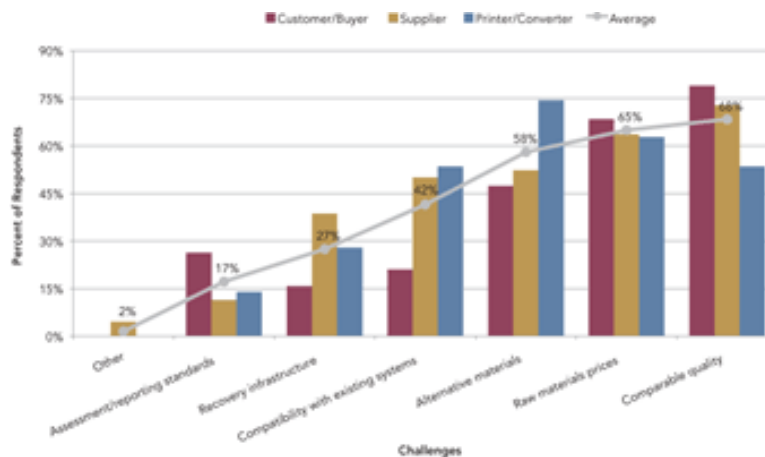
Further up along the supply chain, Customers/Buyers and Suppliers share some similar challenges. Comparable quality was the greatest challenge for both Customer/Buyers and Suppliers, with 79% and 73% respectively. This is followed by raw materials prices (68% and 64% respectively), and alternative materials (47% and 52% respectively). The production-oriented Suppliers also see compatibility with existing systems (50%) as a top three challenge as well as recovery infrastructure (39%).

For Printers/Converters, the top challenges are alternative materials and raw materials prices, followed by comparable quality and compatibility with existing systems. Compatibility is an issue during production because many companies have established

workflows and specialized equipment. It is important that new materials be able to be processed without making changes to workflow or requiring the purchase of new equipment.

Figure 7. Sustainable printing challenges by respondent category

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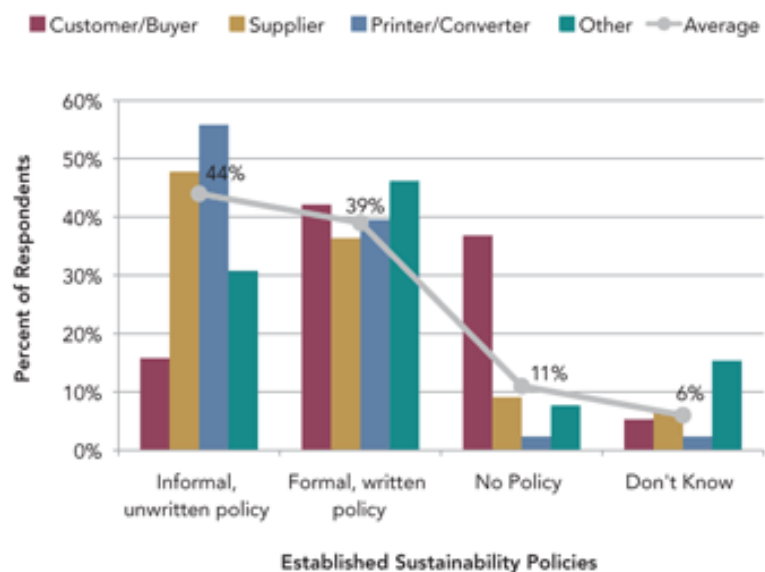


Current Policies & Practices

Most packaging gravure printers have sustainability policies in place, as 83% of companies have established sustainability policies: 44% were informal and unwritten, while 39% were formal and written. On average, 11% of companies have no policies in place.

Figure 8. Established sustainability policies by respondent category

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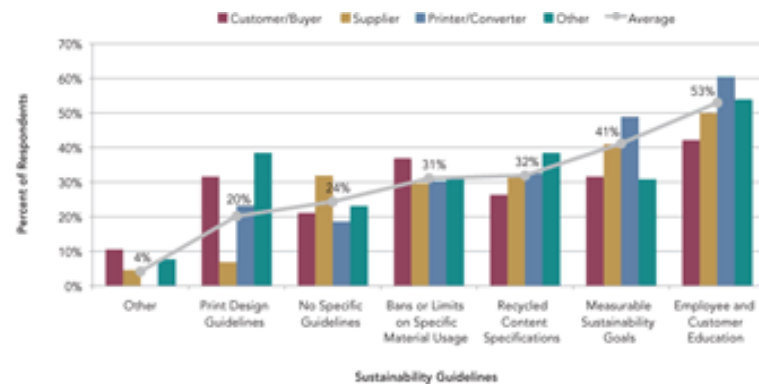
It is interesting to note that though customer requirements is a top driver for sustainability, a fairly large portion (37%) of customer/buyers have no sustainability policies.

When asked what guidelines are included in their sustainability

policies, most respondents include employee and customer education guidelines. Many also include measurable sustainability goals. These two categories are very broad (recycled content can also fall under measurable goals), and therefore more specific guidelines merit further survey. An example is print design guidelines, which are included by many companies involved at the beginning of the production stream (Customers/Buyers and Other, which were 12% and 18% above the average, respectively).

Figure 9. Guidelines included in sustainability policies by respondent category

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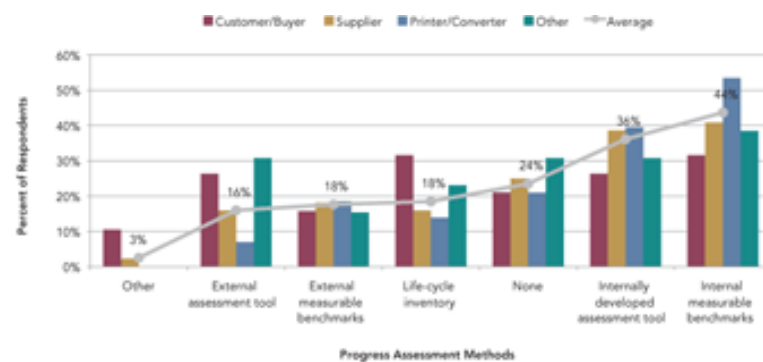


Progress Assessment & Criteria

Most respondents use internal benchmarks and tools to assess sustainability progress. Other methods in use included 44% of respondents who use internal measurable benchmarks, and 36% who use internally developed assessment tools.

Figure 10. Methods of assessing sustainability progress by respondent category

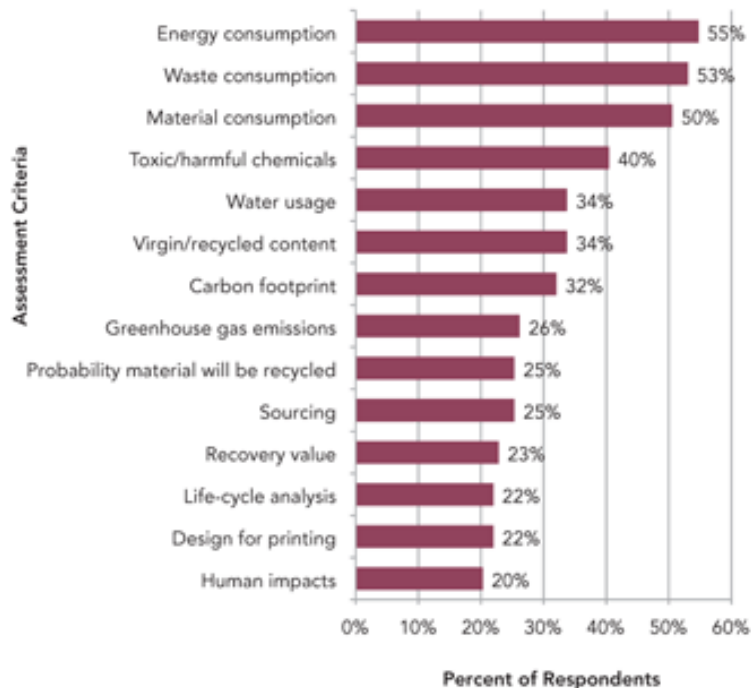
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The criteria used to assess a company's progress in sustainability shapes the actions taken and their resulting impacts. For example, the inclusion of GhG emissions in an assessment will most likely cause the company to focus on and eventually decrease their air pollution. Therefore, respondents were asked what criteria were included in their sustainability assessments.

Consumption of materials was a popular criterion, with approximately half of all respondents selecting energy, waste, and material consumption as one of the criteria used in their sustainability assessment.

Figure 11. Criteria included in assessment efforts
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Criteria most frequently included in assessments were easier to measure— energy in BTUs, recycled content as a percentage, wastes in pounds, etc. On the other hand, criteria at the bottom of the list were more complicated, not defined by hard units, and difficult to measure. These include life-cycle analysis, design for printing, and human impacts.

Benefits & Standards

The greatest result of sustainable growth is the reduction of environmental impact and wastes/costs. This may be because respondents feel that both environmental and economic issues are well addressed by the industry.

Figure 12. Results of sustainable growth
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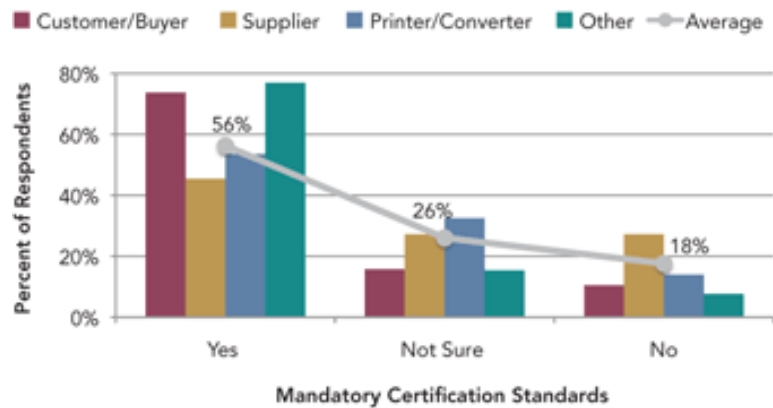




56% of companies felt that there should be mandatory certification standards before companies can market themselves as sustainable. Customers/Buyers and Other stakeholders felt more strongly about establishing standards, with 74% and 77% respectively saying "yes" to mandatory certification.

Figure 13. Level of support for mandatory certification standards by respondent category

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Necessary Developments

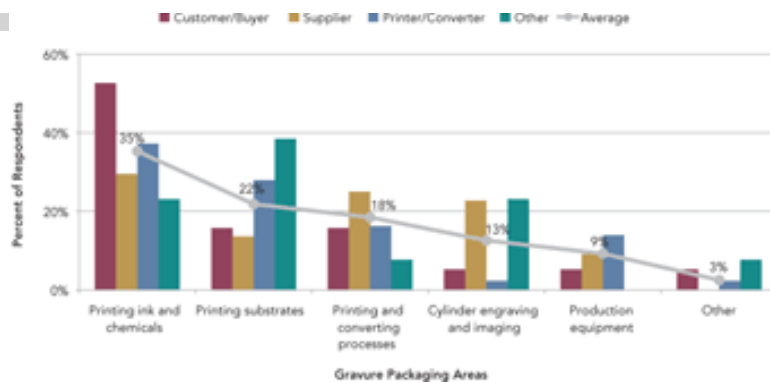
There are a variety of areas within the gravure packaging industry that are affected by sustainability. Respondents were asked what area of gravure packaging currently requires significant developments in order to be more sustainable.

On average, 35% of respondents felt that significant developments are needed in printing ink and chemicals (such as cleaning solvents and fountain chemicals), while Other stakeholders felt that printing substrates was the area most in need of developments.

Figure 14. Areas requiring significant developments in gravure packaging by respondent category

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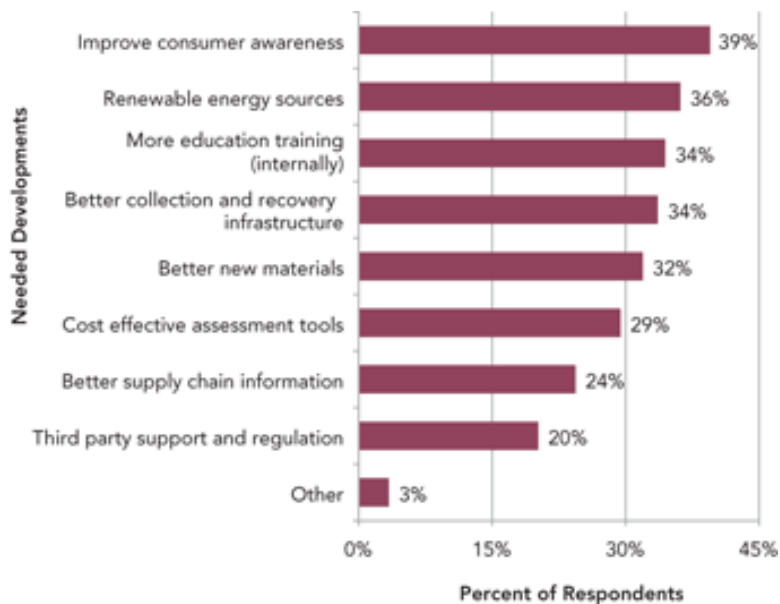




Respondents were then asked what developments are most needed to best achieve sustainability goals. There was no clear majority response, indicating that necessary developments are varied and there are many different areas within the industry that need work.

Figure 15. Necessary developments to help achieve sustainability goals

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Conclusion

Sustainability within the gravure packaging industry is becoming a widespread movement that will only continue to grow. The survey results demonstrate that sustainability is indeed a substantial issue, with 62 percent of respondents indicating that they are moderately or very familiar with sustainability and 72 percent of respondents saying that the emphasis on sustainability has increased over the past few years.

Between the various stakeholders, there is a difference in environmental concerns, which may be due to their different functions within the supply chain. Customers and buyers value more marketable concerns such as recycled content and material sourcing, while suppliers, printers and converters value material-

and production-specific concerns such as resource wastes, energy consumption and harmful/toxic chemicals.

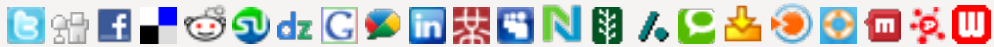
In terms of the future development of sustainability, there is a concern for proper marketing efforts to prevent "green washing." 56 percent of respondents felt that there should be mandatory certification standards before companies can market themselves as sustainable. Competitive quality and pricing is also an important area for gravure packaging stakeholders. Respondents indicated that energy and material costs and availability as well as changes in technology would impact their strategic direction in terms of sustainability.

2009-2010 Research Monographs

To read about this research in detail, download the monograph from: <http://print.rit.edu/pubs/picrm201006.pdf>

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