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SOUTHEAST ASIA 2018

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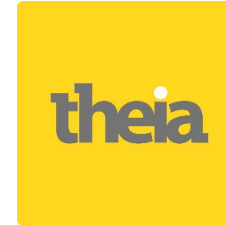




PARENT COMPANY
(est. 1991)



CONVENTIONAL
(FLEXO)



SUBSIDIARY COMPANY
(est. 2017)



DIGITAL

VS

Which is right for your business?

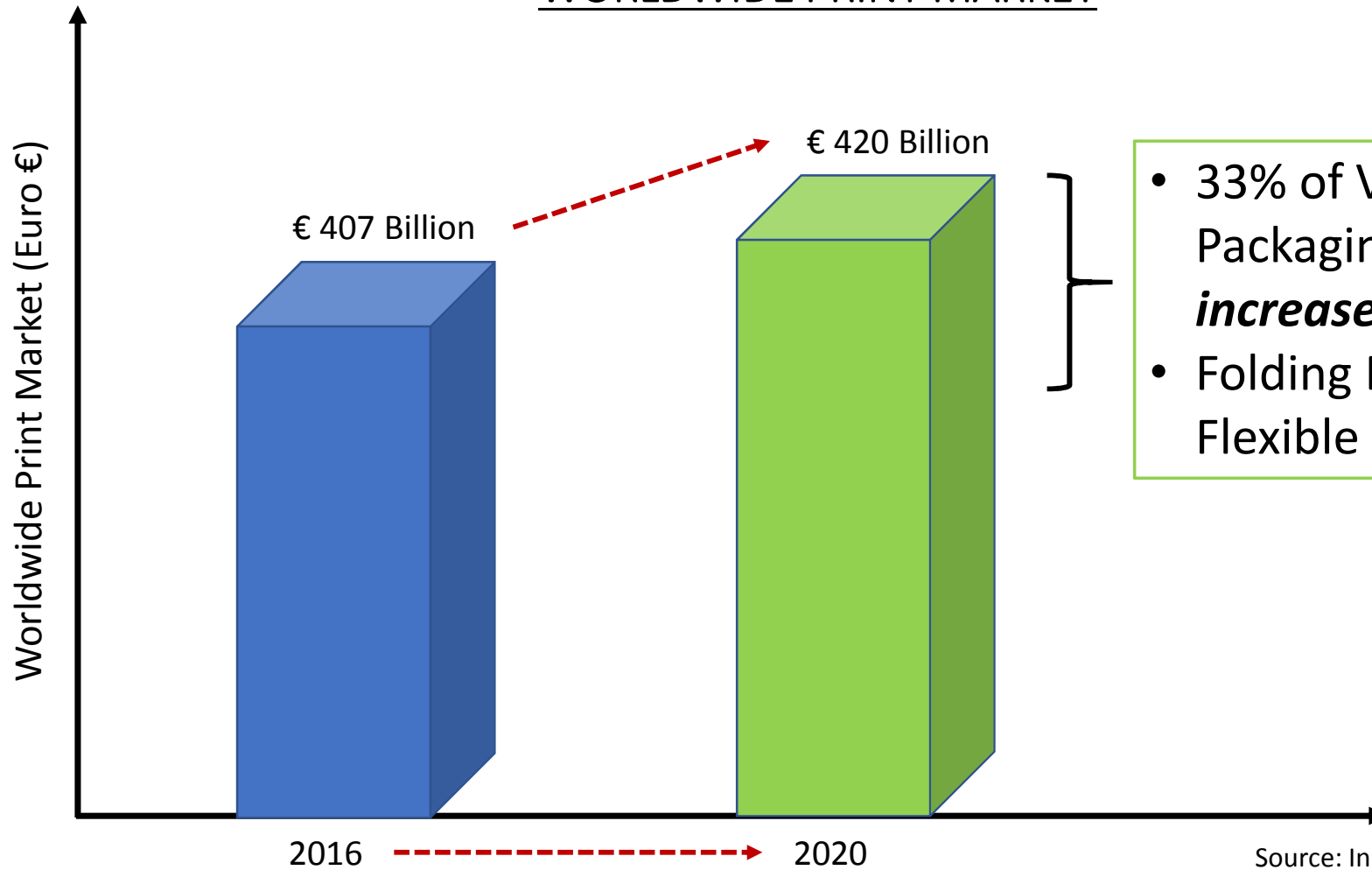


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WORLDWIDE PRINT MARKET



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- 33% of Volume → Packaging Print (**3.3% increase per year**)
- Folding Boxes, Labels & Flexible Packaging

Source: Ink World Magazine

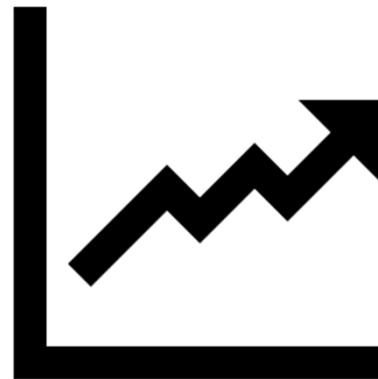


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Projected Growth: Flexo vs Digital

FLEXO

2.6%
growth
p.a.



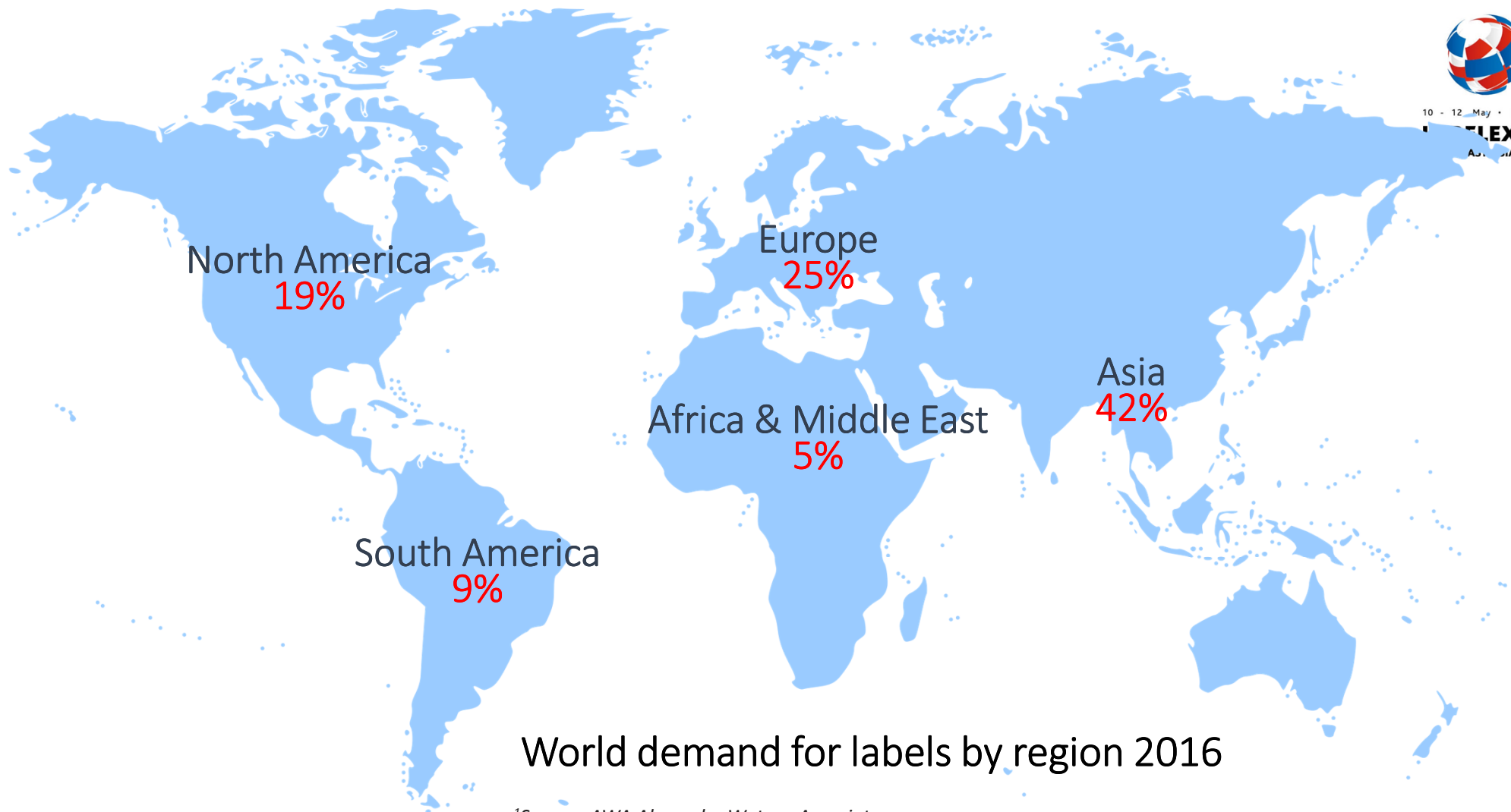
DIGITAL

8%
growth
p.a.

Source: Ink World Magazine



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ALEXPO
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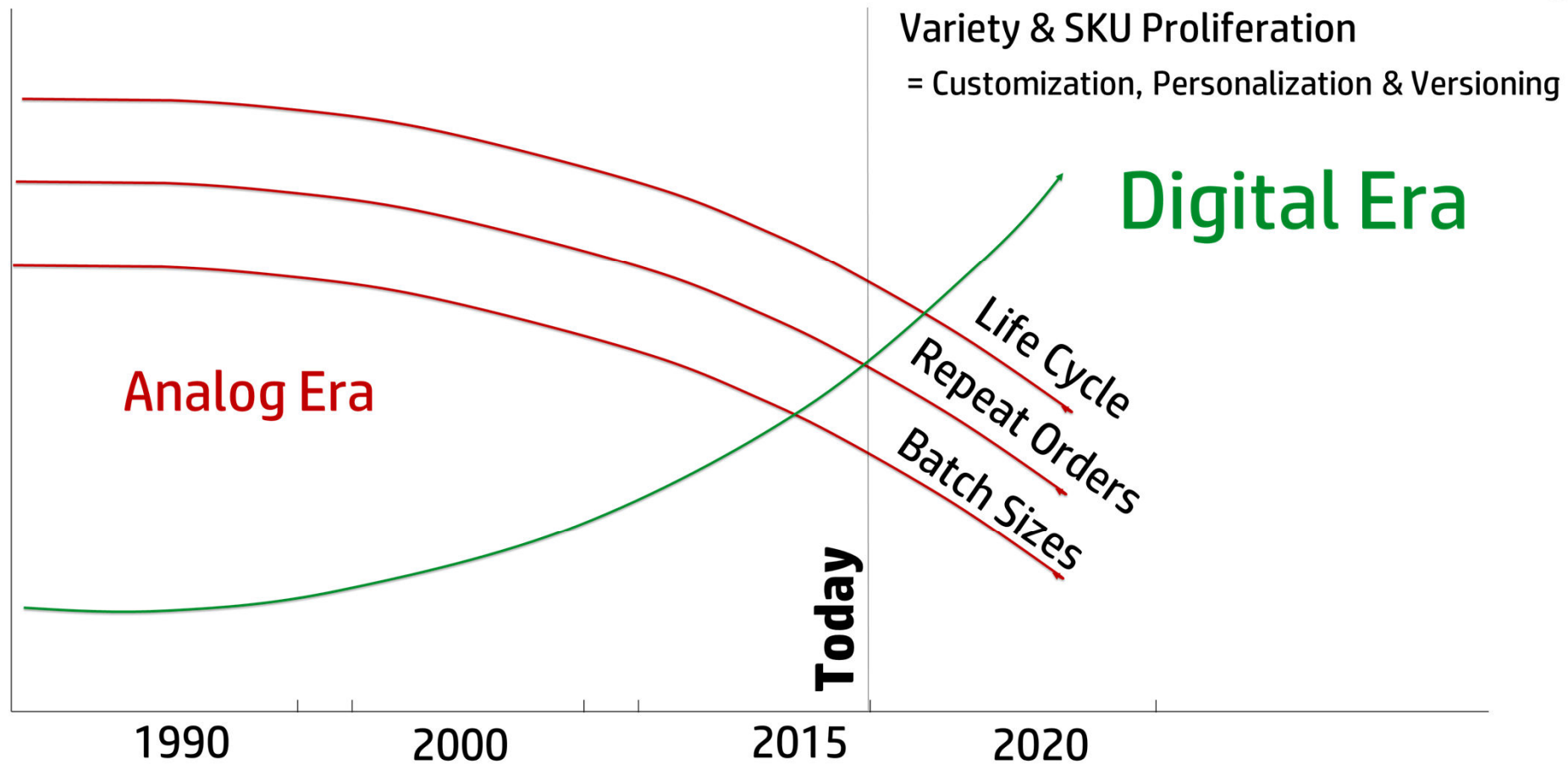
World demand for labels by region 2016

¹Source: AWA Alexander Watson Associates

Consumer Package Goods: Market Trends



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KEY DRIVERS & TRENDS



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%	Critical	Very important	Fairly important	Relevant but not important	Not at all important	Rating*
Older population	0.0	45.5	9.1	45.5	0.0	2.00
Smaller households	0.0	54.5	27.3	18.2	0.0	2.36
Convenience	27.3	54.5	18.2	0.0	0.0	3.09
Health awareness	27.3	63.6	9.1	0.0	0.0	3.18
'On-the-go' lifestyles	18.2	54.5	0.0	27.3	0.0	2.64
Brand enhancement/ differentiation	27.3	36.4	36.4	0.0	0.0	2.91
New packaging material development	18.2	45.5	36.4	0.0	0.0	2.82
Smaller pack sizes	0.0	54.5	27.3	18.2	0.0	2.36
Recycling	18.2	27.3	18.2	27.3	9.1	2.18

Note: * averaged response whereby 4=critical; 3=very important; 2=fairly important; 1=relevant but not important; 0=not at all important

Source: Pira International Ltd survey of WPO member organisations



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TOP 5 KEY DRIVERS & TRENDS

Health Awareness	90.9%
Convenience	81.8%
'On-the-go' lifestyles	72.7%
Brand Enhancement / Differentiation	63.7%
New packaging material development	63.7%

Source: Pira International Ltd

Flexo vs Digital Printing



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5 POINTS TO CONSIDER:

- 1) QUALITY
- 2) SUBSTRATE
- 3) VOLUME (and VARIANTS)
- 4) BUDGET
- 5) LEAD TIME



CASE STUDY



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CASE STUDY



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FLEXO

- Sales: 60,000 per month
- No. of Variant: 1
- MOQ on Flexo = 300,000 labels
- Cost per piece = 1 cent = US\$3,000 per PO

CASE STUDY



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9 Flavours

Limited Edition



FLEXO

- Sales: 120,000 per month
- No. of variants: 12
- MOQ on flexo = 300,000 labels per variant = 3.6 million labels
- Cost per piece = **1.0 cent** = US\$36,000 per PO

CASE STUDY



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9 Flavours

Limited Edition



DIGITAL

- Sales: 120,000 per month
- No. of variants: 12
- No MOQ & fixed Qty on digital, Print Volume = 120,000 labels per month
- Cost per piece = **1.5 cent** = US\$1,800 per month



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Now just imagine this....

FLEXO

Summary Comparison



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Strengths:

- More economical for medium to long runs
- High speeds for faster output
- Wide range of substrates available for printing
- Wide range of finishing abilities
- Various use of metallic inks, varnish, lamination, foils, etc.

Weaknesses:

- Down time while changing plates & between jobs
- Plates can be costly to change

DIGITAL Summary Comparison



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Strengths:

- Suitable for short to medium runs
- Less setup time – no plates required
- Flexible - able to make changes quickly
- Variable data printing
- Produces consistent bright colours and smooth graduations
- Ability to reach 95% of Pantone colours

Weaknesses:

- Not suitable for large orders – not economical and slow
- Limited on substrates and in-line finishing options



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THANK YOU