

Image-to-Print

Printing Technology & Innovation Days

**Market Trends & Innovations
in Flexible Packaging**

Ulrike Hausmann
Janoschka

Janoschka

Founded in 1976
by Manfred Janoschka

Welcome Mr. Janoschka



Janoschka

A family owned -

The next Generation

CEO

Alexander Janoschka



Executive Board Janoschka Group



Alexander Janoschka, CEO
- Chief Executive Officer
- Shareholder



Ulrike Hausmann, CMO
- Chief Sales & Marketing Officer



Michael Janoschka, COO
- Chief Operation Officer
- Shareholder



Fabian Naudascher, CFO
- Chief Financial Officer

Headquarter in Kippenheim, Germany

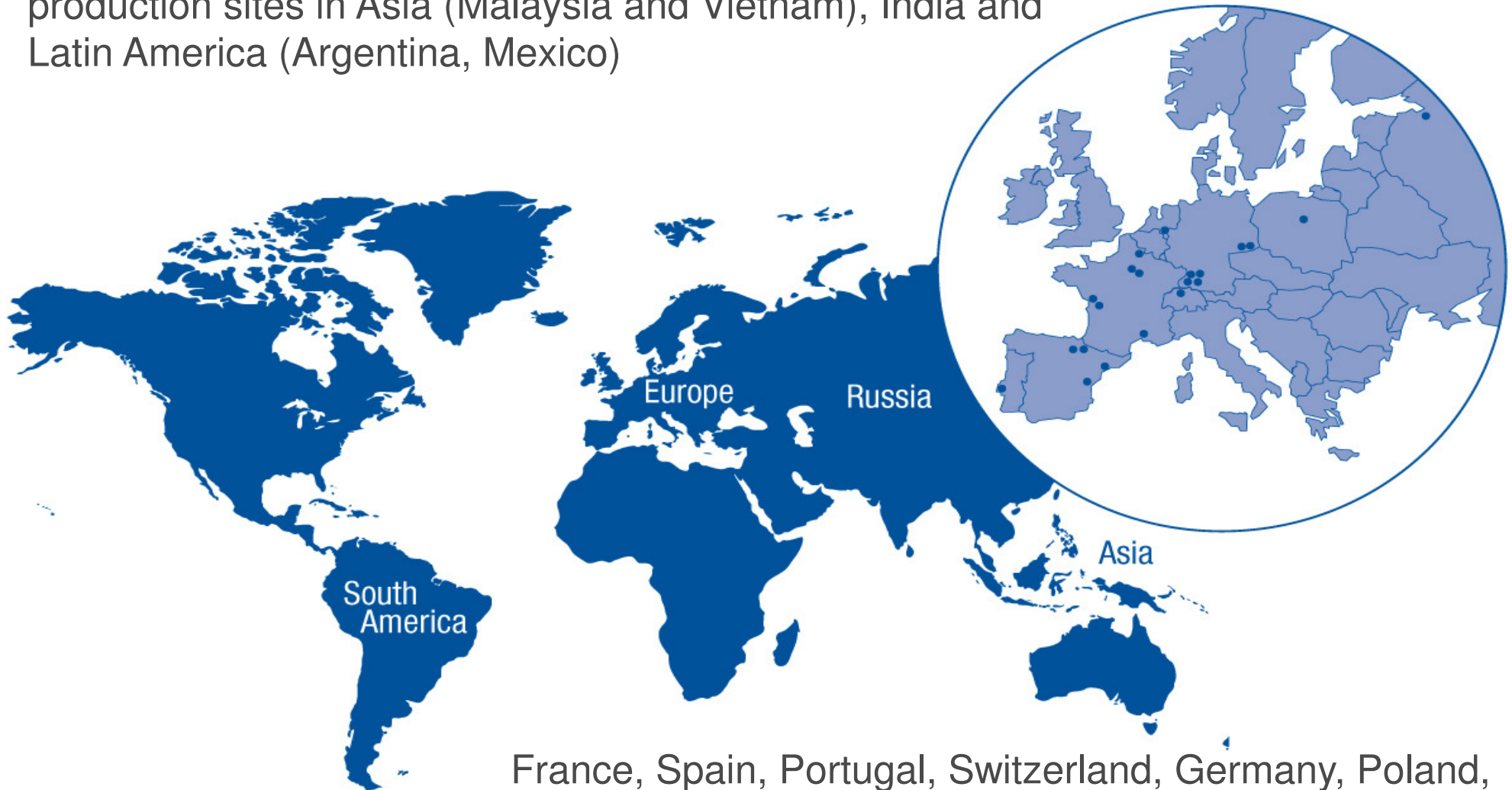


Group Management, Strategy, Research and Development

Janoschka Academy (internal and external trainings)

Production, all Technologies available (Gravure, Laser, Etching, Embossing, Repro.....)

Janoschka | the biggest Network in Europe with production sites in Asia (Malaysia and Vietnam), India and Latin America (Argentina, Mexico)



France, Spain, Portugal, Switzerland, Germany, Poland, Russia, Turkey

Key Figures

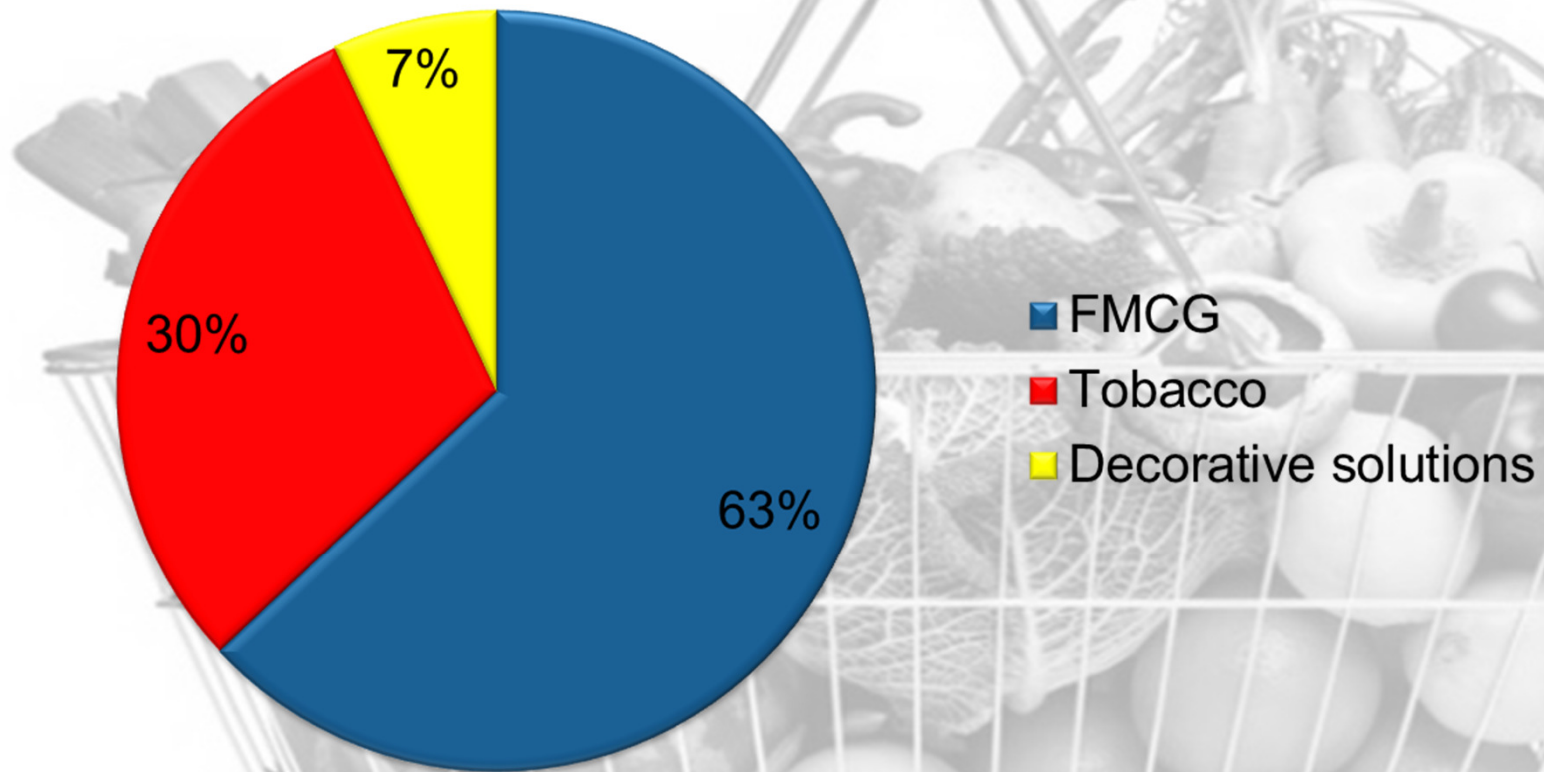
- Revenues of 120 Million €
- 1400 people
- 300 graphic operators
- Artwork & Repro 100.000 SKU's per year
- 220.000 gravure cylinder per year
- 50.000 cylinder bases per year
- 30.000 sqm of polymer plates
- 10.000 Elastomer Sleeves

Key Figures

- 90 Helioklischographs (Hell, Daetwyler, Ohio)
- 8 Daetwyler DLS Laser-lines
- 5 Schepers Laser
- 3 Think-Lab Laser lines
- ...



The Markets we serve...



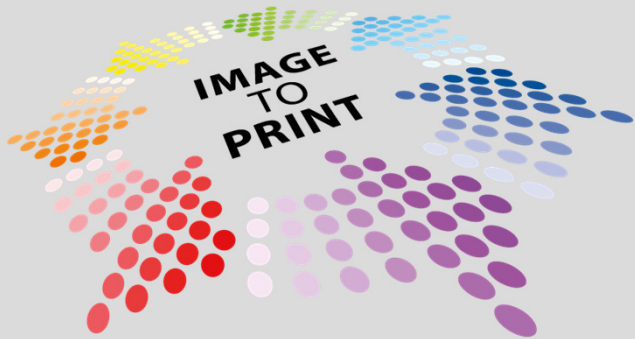
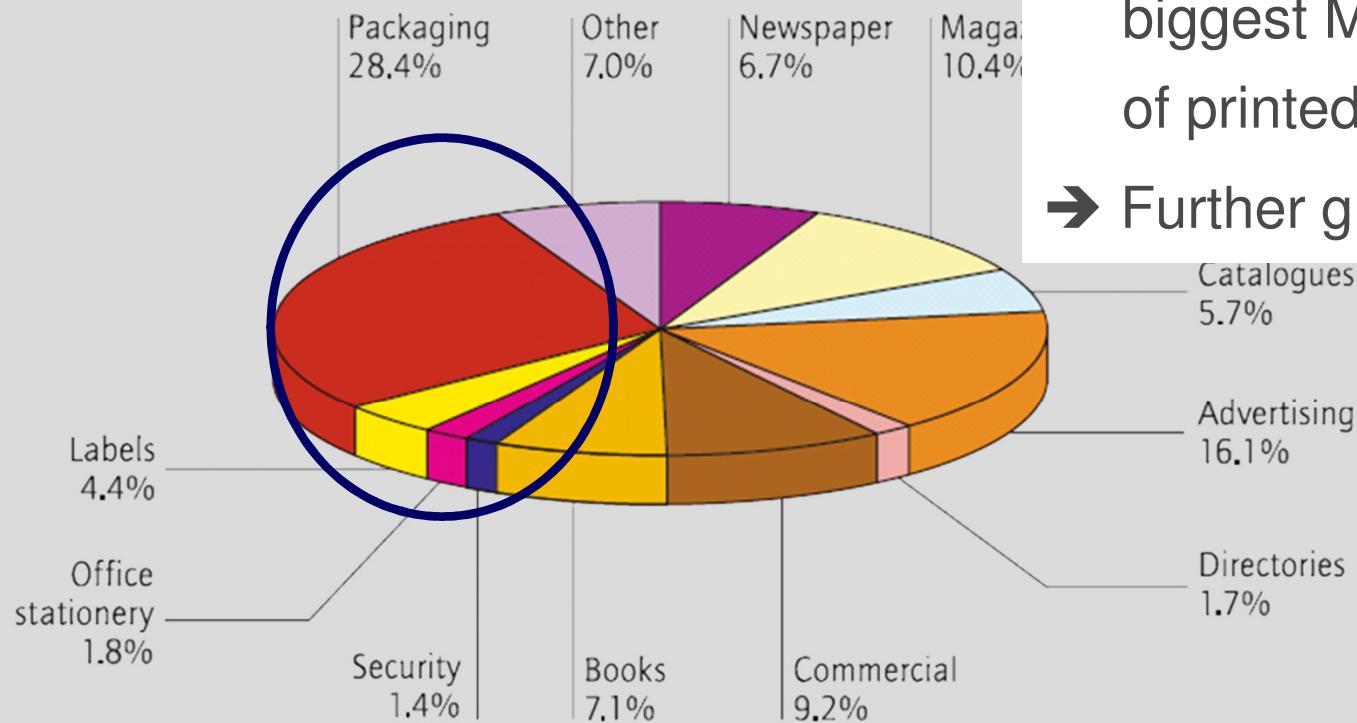


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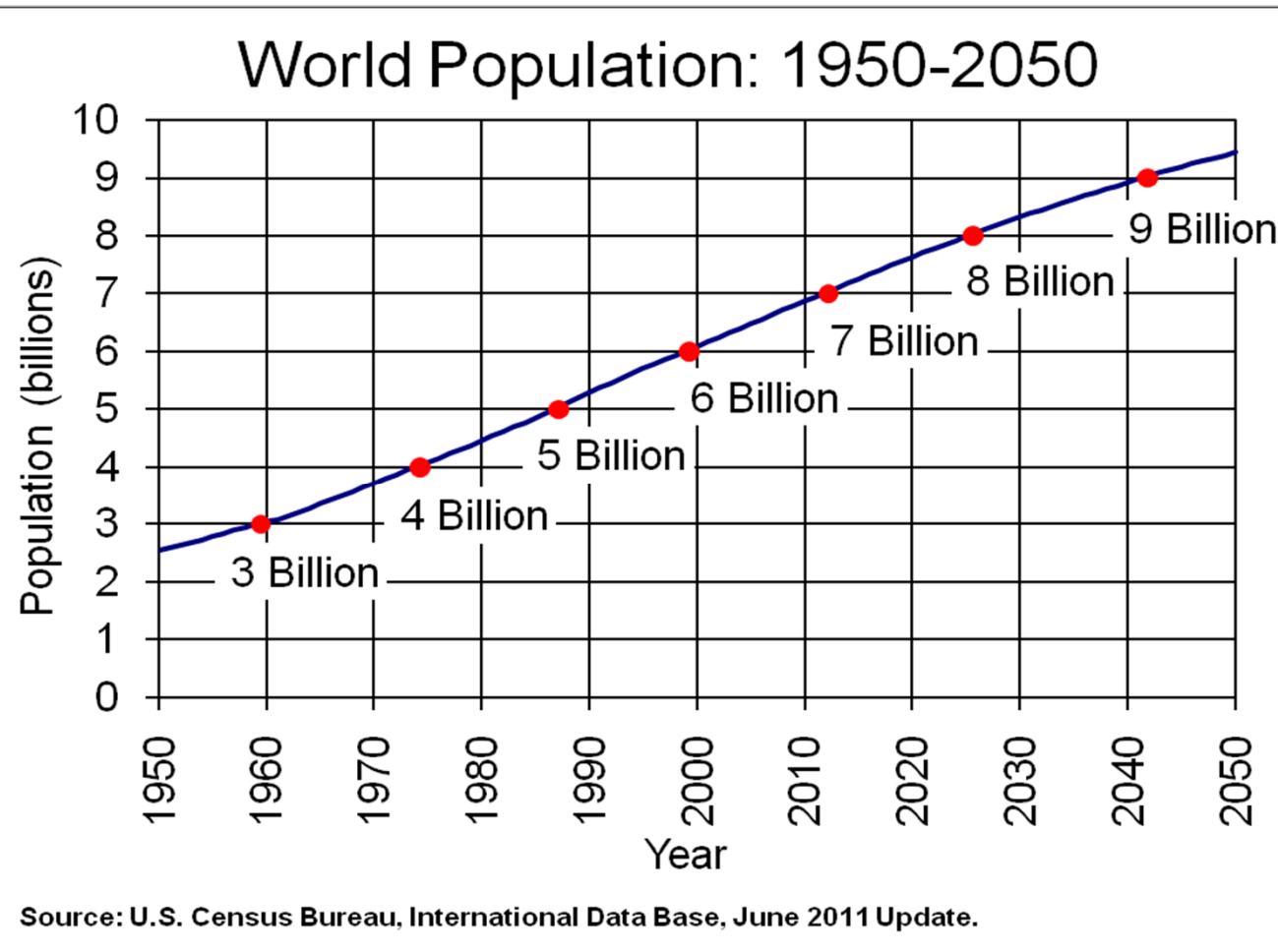
Shares of „Printed“ Products



- Packaging Printing has the biggest Market share of printed products
- Further growth is expected

Source: Pira International Ltd

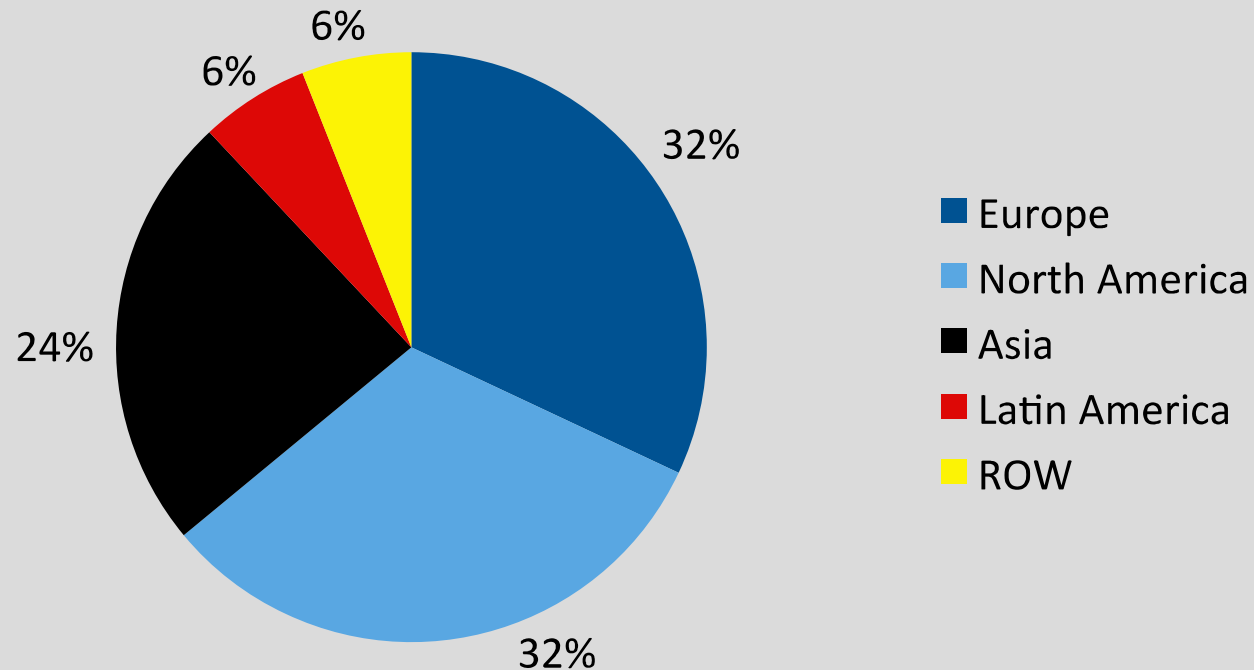
World Population is currently growing around 1.14% per year.
Average population change is estimated around 80 million per year.



Top 10 Largest Countries by Population (October, 11th 2014)

1	China	1,396,093,087
2	India	1,271,707,952
3	U.S.A.	323,295,535
4	Indonesia	253,643,395
5	Brazil	202,504,191
6	Pakistan	185,978,869
7	Nigeria	179,913,786
8	Bangladesh	159,053,624
9	Russia	142,365,342 Declining population
10	Japan	126,959,587 Declining population
.		
16	Germany	82,631,447 Declining population

Packaging Printing in Regions



Change of Markets..

Europe:



- Either saturated or declining...
- Price-pressure...
- Smaller packs, cheaper...
- Shorter run length...
- “Big” volumes moved to low-cost countries...

Emerging Markets:



- 2-digit growth...
- Large number of consumers...
- City concentration...
- Supermarkets...
- “**almost**” no flexo in Asia...
- However, today, packaging consumption in Europe or North America is still 20 times higher than in Asia...

What is Packaging?

Contains !

Protects !

Preserves !

Carries Information !

Eye-catcher...!

Makes the Brand...!

Makes the sale !

Packaging attires...



Packaging **reflects** the **quality** of the product

Packaging is **FUN** !



this is no **FUN** !

No **FUN**
neither !



Packaging has been existing since decades...



Flexible Packaging in 2014

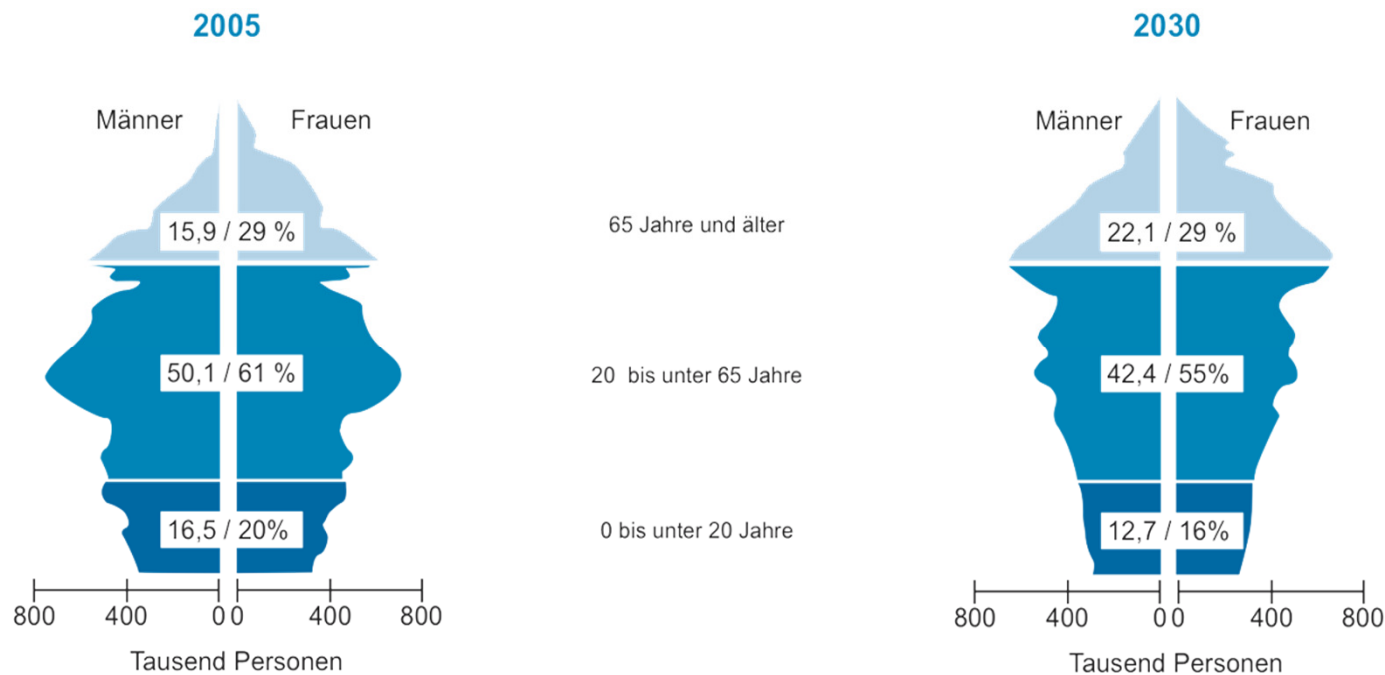
- Packaging has improved significantly in terms of print quality and color.
- Packaging is an essential component of our modern life-style.



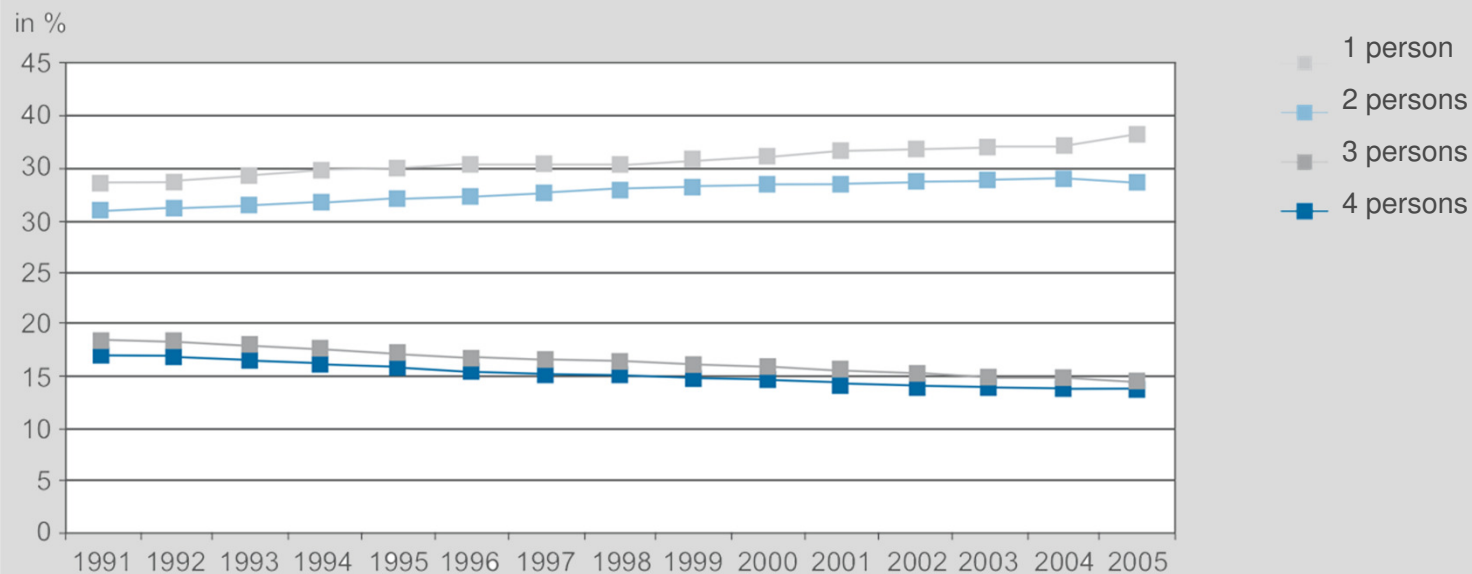
Market requirements in Pre-Press for Flexible Packaging



Change in consumer needs and behavior is changing the requirements of our industry



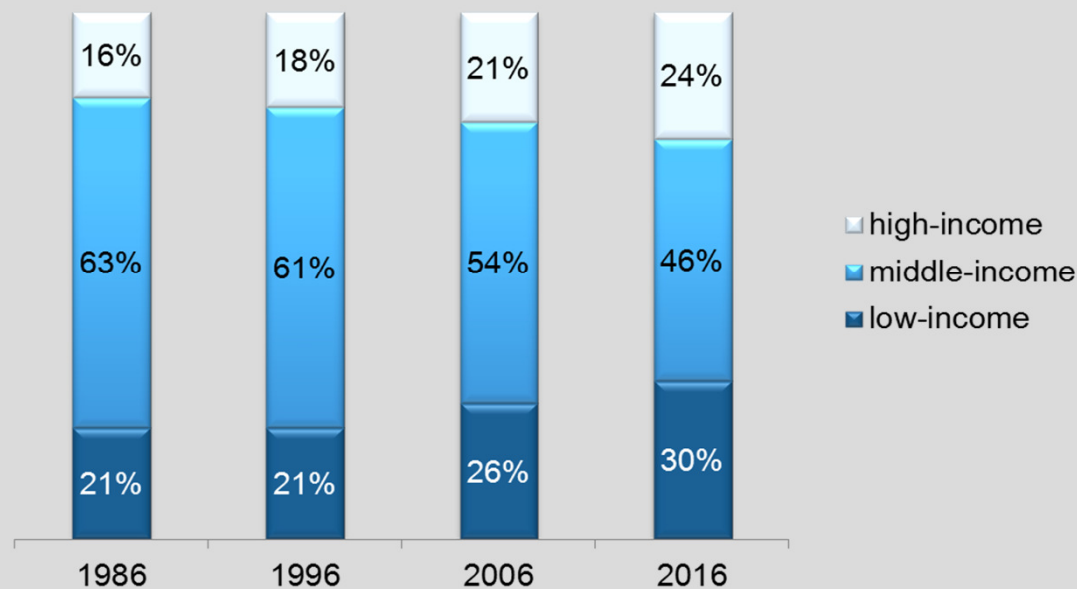
Change in consumer needs and behavior is changing the requirements of our industry



Evolution of „person per household ratio“ in Germany



Change in consumer needs and behavior
is changing the requirements of our industry



Change in spendable income in Europe

Change in consumer needs and behavior
is changing the requirements of our industry



Smaller packs, affordable packs

Change in consumer needs and behavior
is changing the requirements of our industry



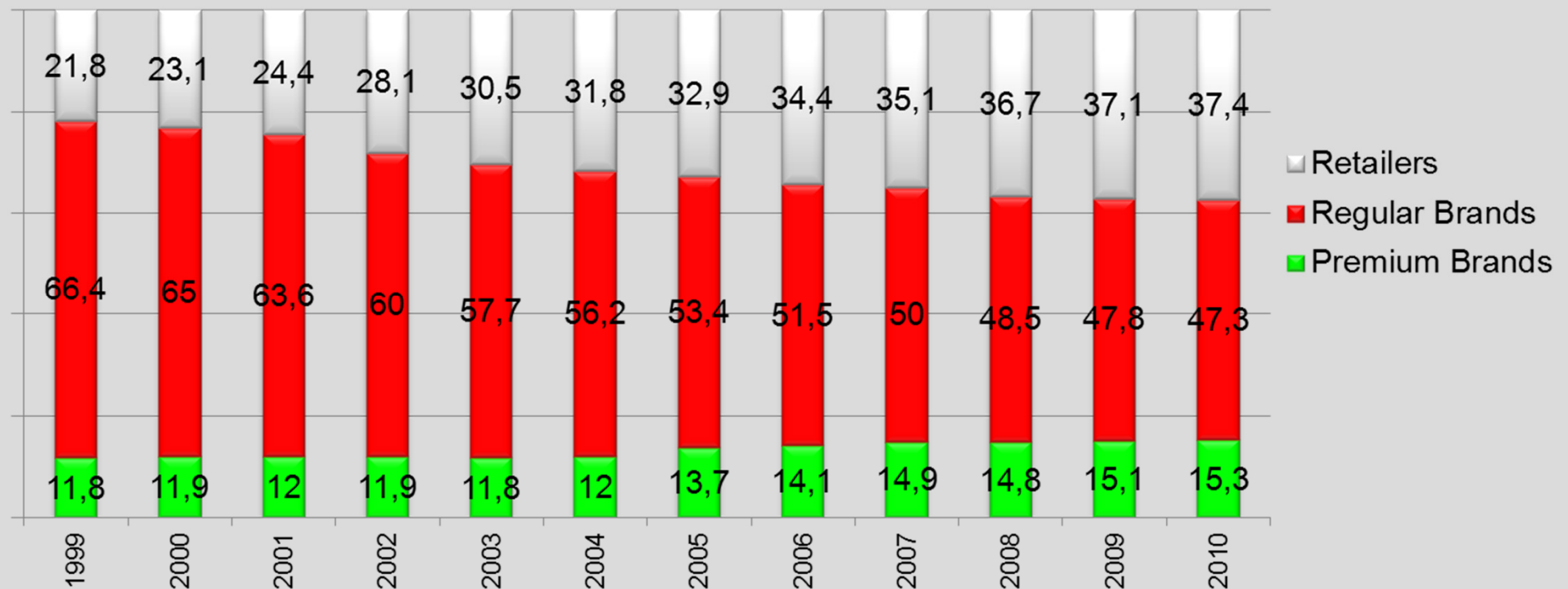
Brand Concentration in the Supermarkets

Retailers gain ground

Sensory overload

Retailers gain market share, brands loosing ground

Daily used products – Market development in %



Market requirements - Sustainability

Change in consumer behaviors - and their needs

- Change of Lifestyle
- Health & Beauty – BIO
- Environment: reduce – reuse – recycle
- Carbon Footprint - biodegradable substrates



Compostable deep freeze packaging

Change in consumer needs and behavior is changing the requirements of our industry

- Target group classifications

A few examples...

- WOOF (Well off older folks)
- DINK (Double income no kids)
- LOHAS (Lifestyle of health and sustainability)
- ...



Market requirements – Technical Support

Changes in market needs
is changing our industry

- Time to Market
- Cost-control, cost-reduction, savings
- Added-value
- Faster printing speed
- New printing presses
- New printing technologies: digital-print



Market requirements – Quality

Changes in consumer needs
is changing our business

- Overall more complexity in packaging design
- Matt and glossy finishes, new lacquers etc.
- Uniform Quality for all printing technologies
- Change in laws, new symbols
- more information, small text and elements on smaller packs

gravure



file



Market requirements - Innovations

Attract the pack...

- Color codes
- Product attraction through form and color
- The sense of touch
- Haptic effects



Market requirements - Innovations

Protection against forgery has become a major topic:

- Need for individual appearance to prevent forgery
- Product identification / security elements on the pack
- Innovation and new technologies are required to do so



Micro Text



SecuTag Color Chips



Guilloche

The importance of Packaging...

Packaging „is the single and biggest driver of sales increases in the world.“

– Muthar Kent, CEO of Coca Cola

The importance of Packaging...

The **importance of color** when buying products:

According to surveys, 85% of consumers stated that **color** accounts for more than half of the factors considered important for choosing products.

Consumer's trust

Color itself and **color consistency** of packaging is also playing an important role in recognition of brands and reaffirming consumer trust.



Diversification - Premium labels versus Private labels



premium brands



private labels

Fast moving consumable goods

Inconsistent color can also create a perception among consumers that a product has been on shelf too long, or in some parts of the world, that the product is not authentic. The long-term effect is that it can dampen consumer trust in the brand.



Color inconsistency reflects “bad quality”



First Moment of truth

Stop



Hold

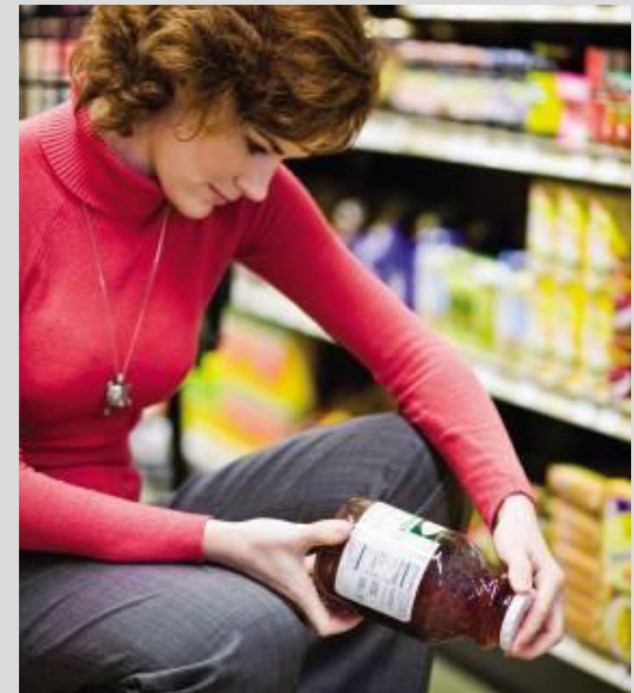


**Make
the
sale**

Disturbance
Eye attraction

Interest
look and feel
hand attraction

convinced



Packaging is the most important communication tool...

The first moment of truths...

- 1,6 seconds...

is the average time to make a purchase decision at the “point of sale”







Packaging is the most important communication tool...

- 1,6 seconds...

is the average time to make a purchase decision at the “point of sale”

- 74% of all purchases are unplanned and decided on the point of sale
- Important → the price
- **60% for packaging and product presentation**



Packaging attracts consumers through innovation...

- innovation and new technologies help to create new products & marketing ideas

NIGHTGLOW

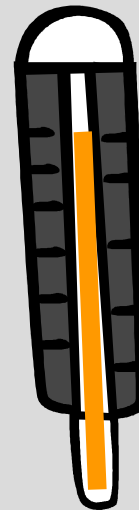
Special printing inks with phosphorescent pigments give your packaging a lasting glow



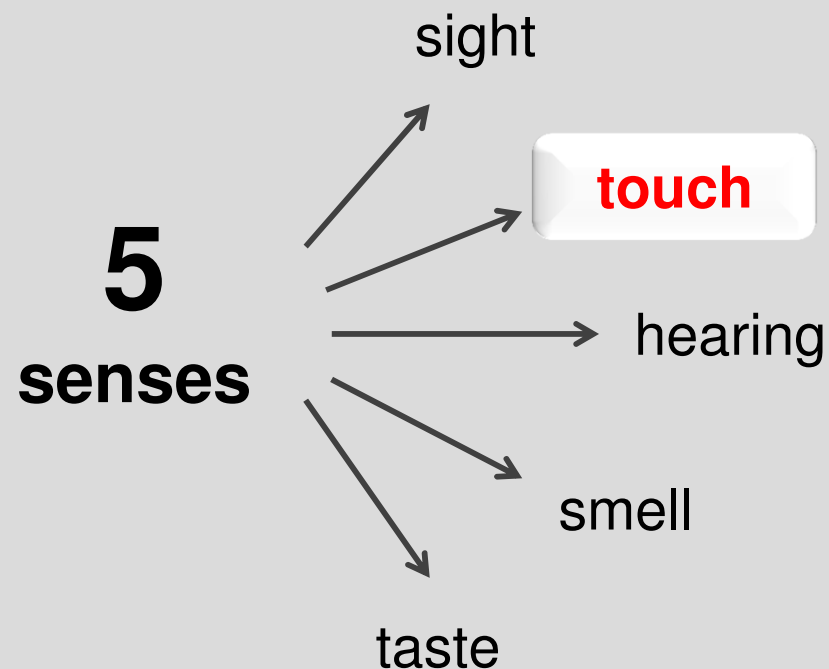
Packaging attracts consumers through innovation...

- Temp-control:
Reversible thermo-chrome inks

These are printing inks which are sensitive to temperature and react to different temperature ranges by changing color.



Packaging attracts consumers through innovation...



The sense of touch...

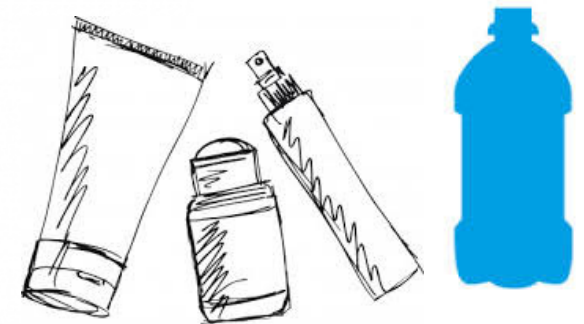


Packaging is a communication tool, it needs to attract the customer, it needs to inform about ingredients, nutrition facts and other legal information.

The sense of touch...



Design and Print needs to be adjusted in form and color.



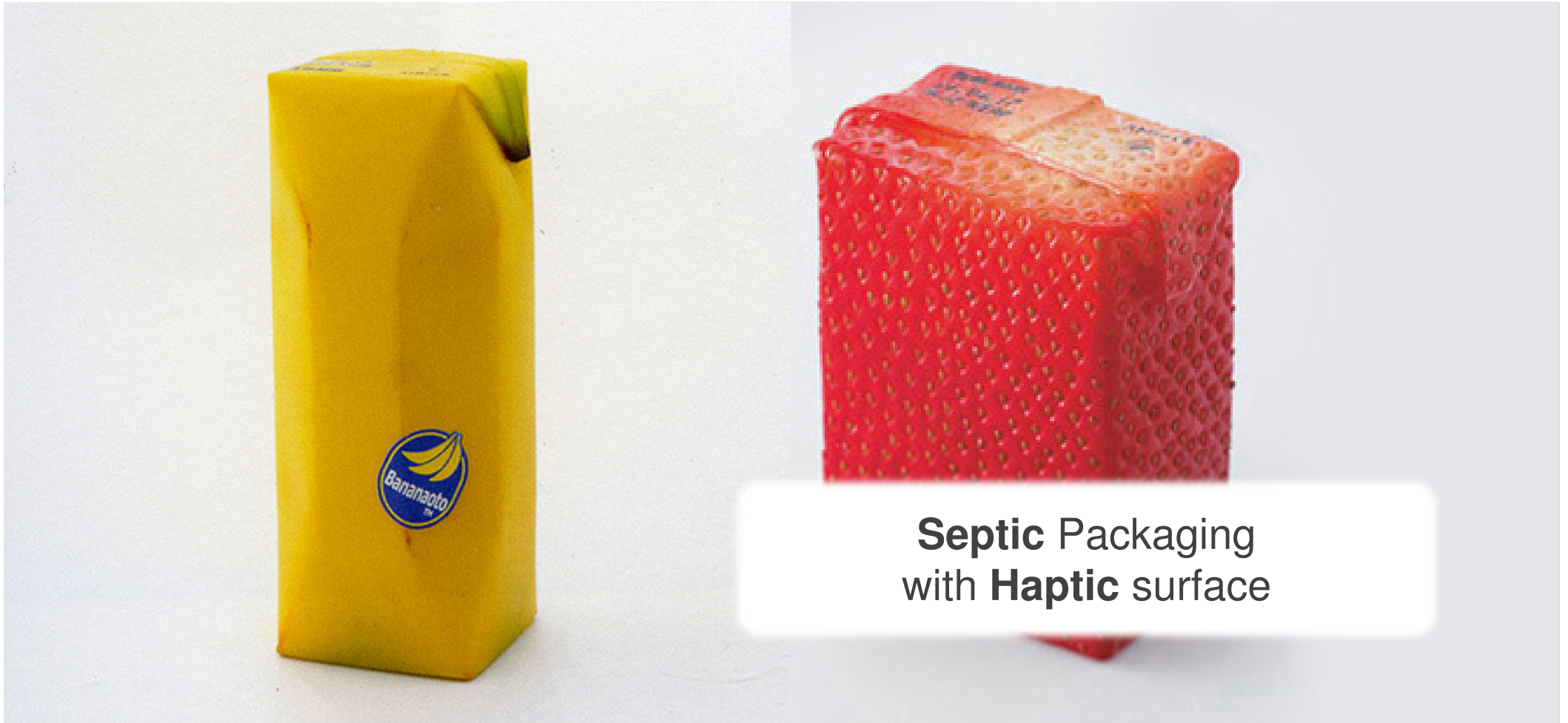
Special Software and know-how required to do so.

The sense of touch...



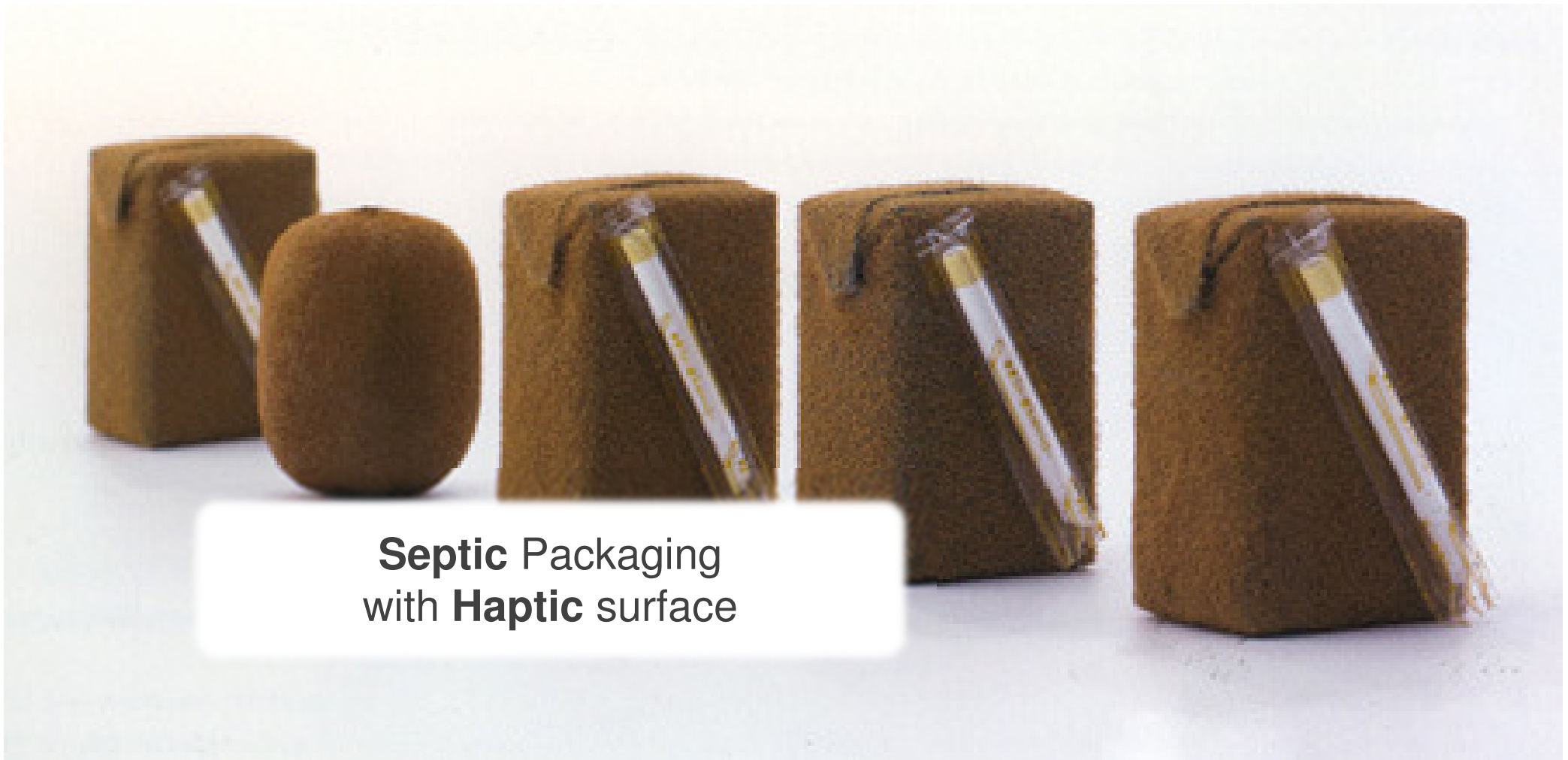
Product attraction through form and color – make it **sell well...!**

The sense of touch...



Septic Packaging
with **Haptic** surface

The sense of touch...



Septic Packaging
with **Haptic** surface

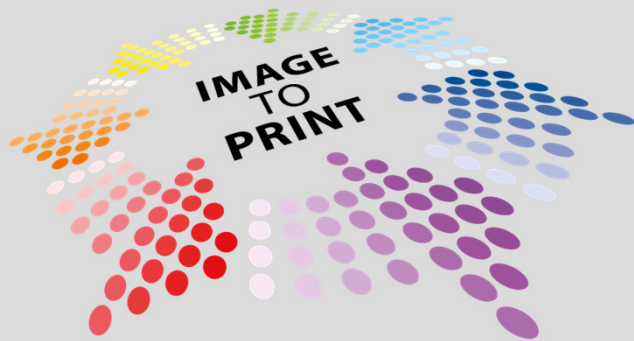


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