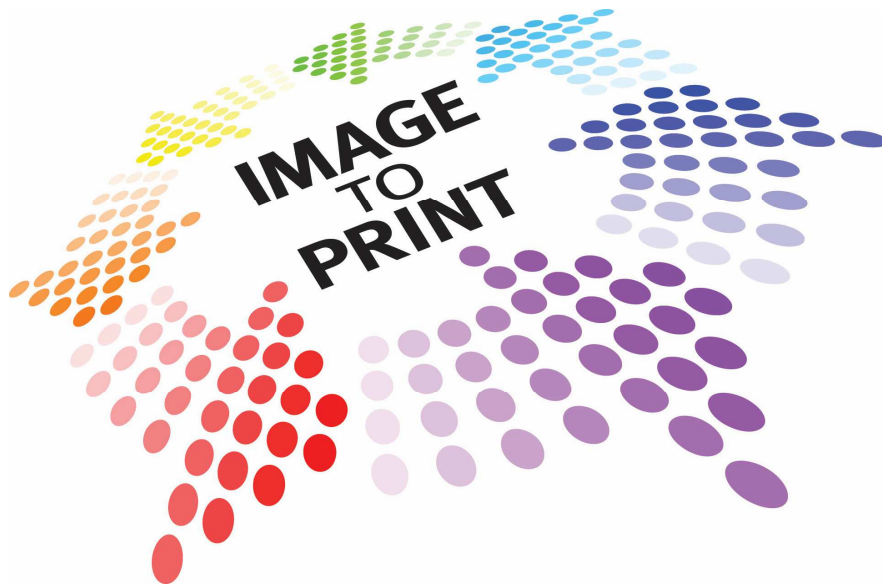


PRINTING TECHNOLOGY AND INNOVATION DAYS FOR FLEXIBLE PACKAGING

Image-to-Print | 19 April 2017

Ho Chi Minh City, Vietnam



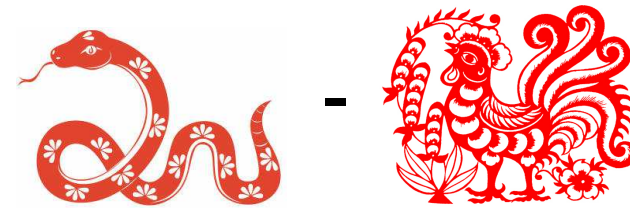
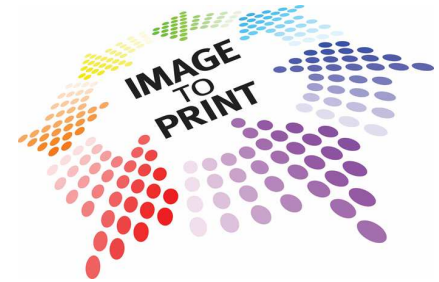
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2013 - 2017

Image to Print is back in Vietnam –
“The story of market developments”

A common statement
of all **Image to Print** partners

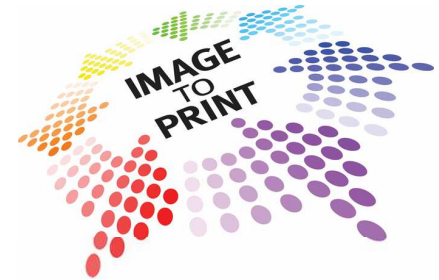


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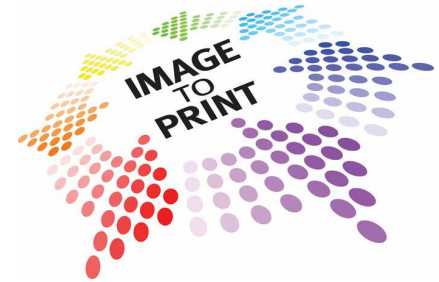
Technology & Innovation Days

image-to-print | April 4th 2013



Technology & Innovation Days

image-to-print | April 4th 2013

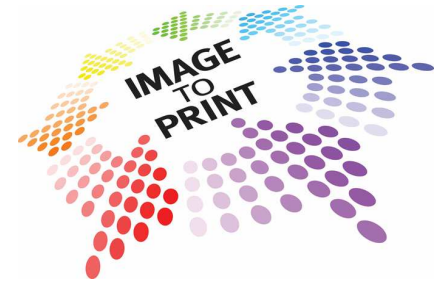


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Technology & Innovation Days

image-to-print | April 4th 2013

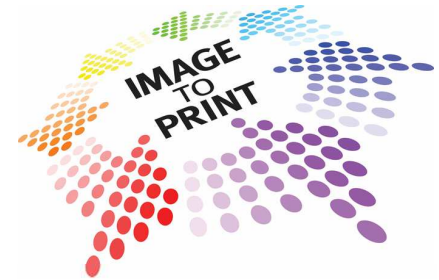


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Technology & Innovation Days

image-to-print | April 4th 2013

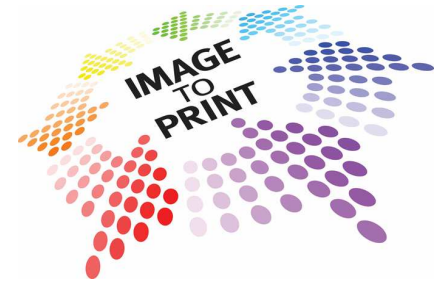


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Technology & Innovation Days

image-to-print | April 4th 2013

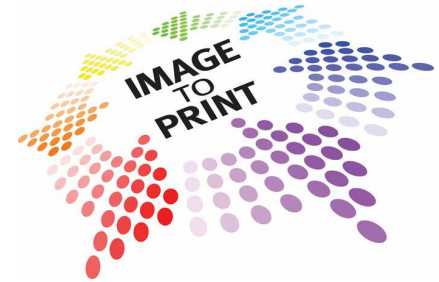


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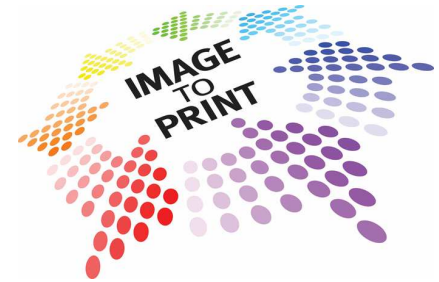
Technology & Innovation Days

image-to-print | April 4th 2013



What happened since...?

- 5 more Roadshows
- 5 more countries
- 800 more participants



Rotogravure Technology & Innovation Days

image-to-print | April 4th 2013

became...

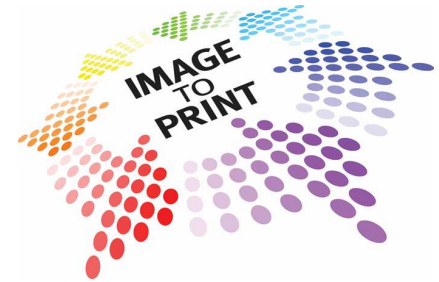
**Printing Technology & Innovation Days
for Flexible Packaging**

image-to-print | April 19th 2017



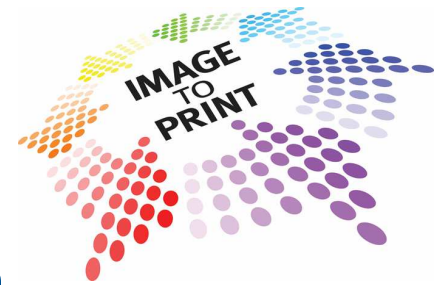
WINDMÖLLER & HÖLSCHER

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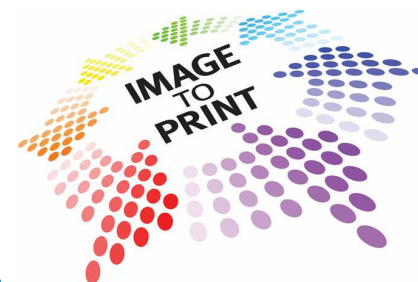
What happened in Vietnam since 2013...?





Continuous steady growth in Vietnam Population





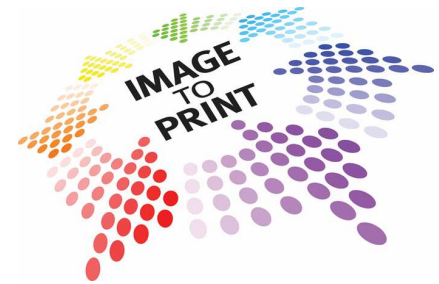
Continuous steady growth in Vietnam Population

World Population growth:

year:	world population	yearly change in %	yearly change in numbers
2013	7 139 598 571	1,21%	82 983 625
2015	7 349 472 099	1,18%	83 949 411
2017	7 515 284 153	1,11%	82 620 878
difference:	375 685 582	5,26%	

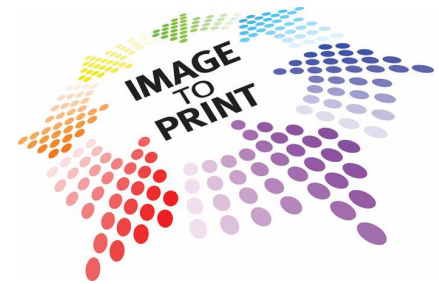
Population growth in Vietnam

year:	population	yearly change in %	yearly change in numbers
2013	90 902 688	1,02%	924 379
2015	93 447 601	1,13%	1 017 965
2017	95 414 640	1,03%	970 440
difference:	4 511 952	4,96%	

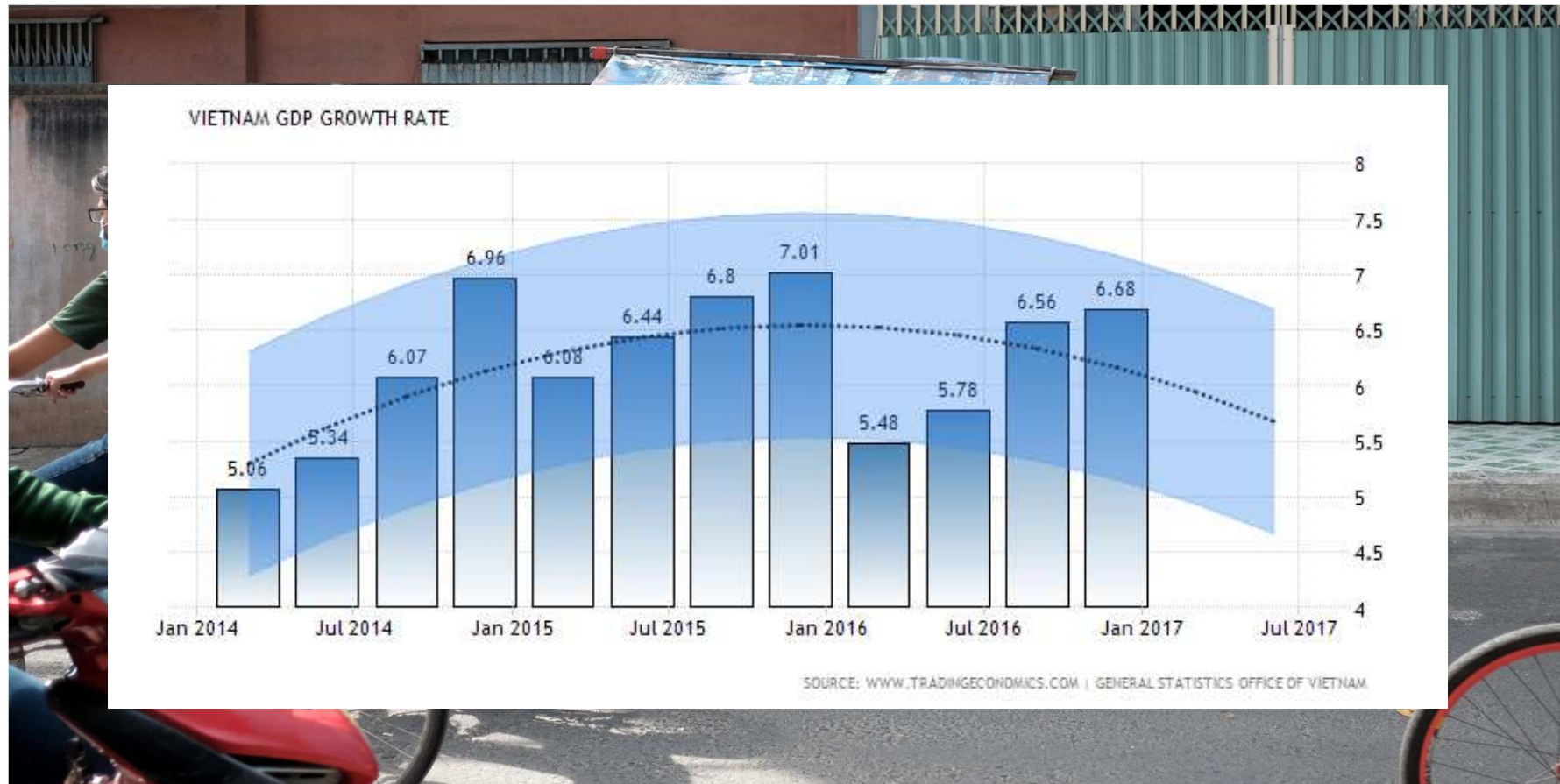


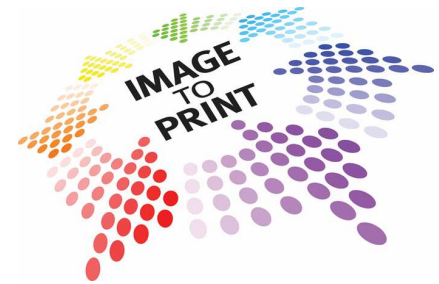
Vietnam GDP growth rate





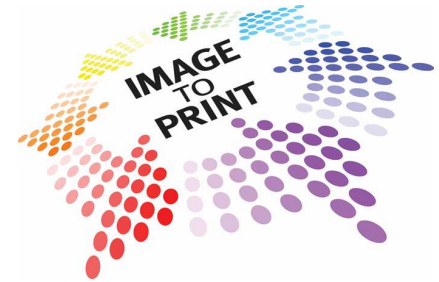
Vietnam GDP growth rate





Example: Vietnam Car Market



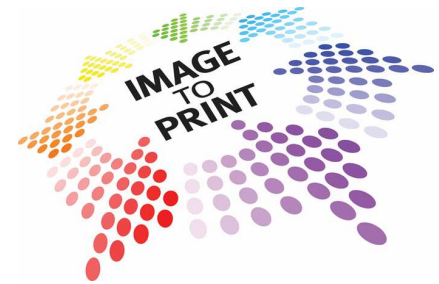


Example: Vietnam Car Market

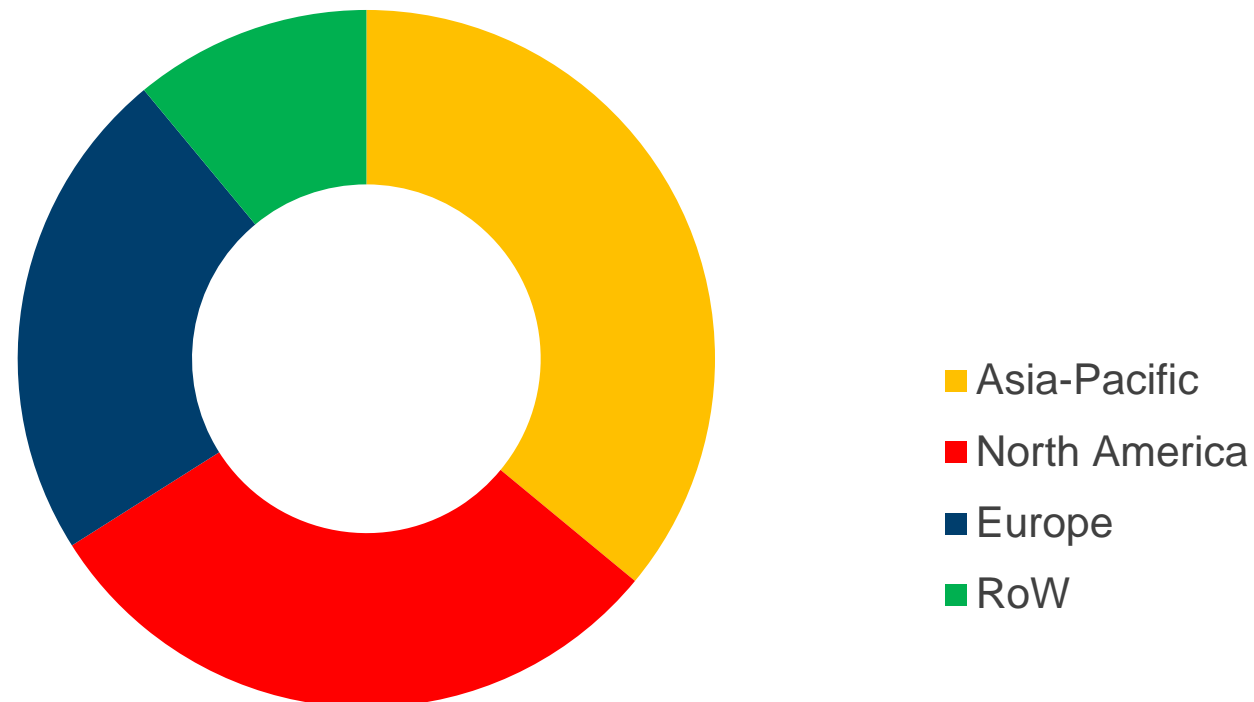
Vietnam was the second fastest growing car market in the world in 2016, with imports favored by most Vietnamese buyers.

JATO, a UK-based market analysis firm, in its latest report, showed that the Vietnamese market grew by 27.1 percent in 2016, becoming the second fastest growing market in the world, just after Singapore.

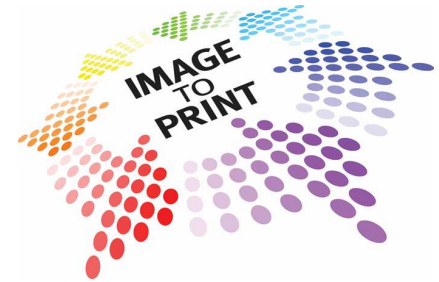
JATO said 84.24 million cars sold all over the world, including 228,478 cars sold in Vietnam. As such, Vietnam ranked 34th in sales. However, with the growth rate of 27.1 percent, it ranked second in terms of growth.



FMCG Packaging Market by regions



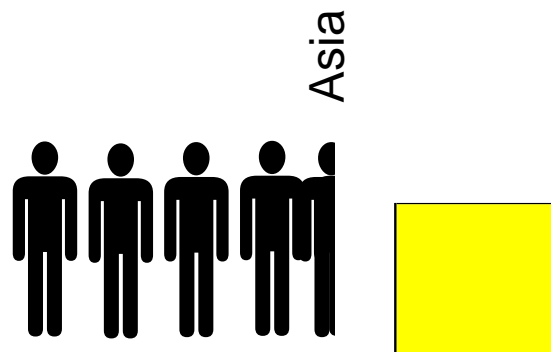
Source: Expert Interviews and "Markets and Markets" Analysis



Packaging Consumption

Packaging consumption per consumer is 20 times higher in Europe compared to Asia.

There are 4,5 times more people living in Asia then in Europe.



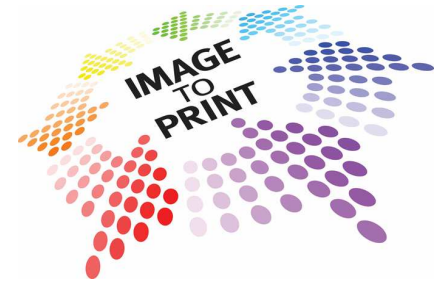
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What was achieved in Vietnam after our last Image to Print 2013

- No visa at entry
- Large numbers of motorbikes and cars have increased
- Ho Chi Minh City has developed well



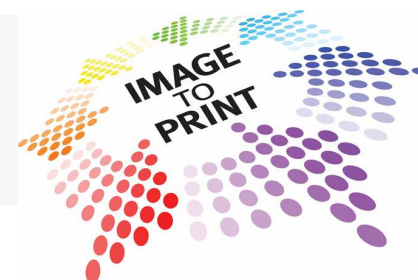


What was achieved in Vietnam after our last Image to Print 2013

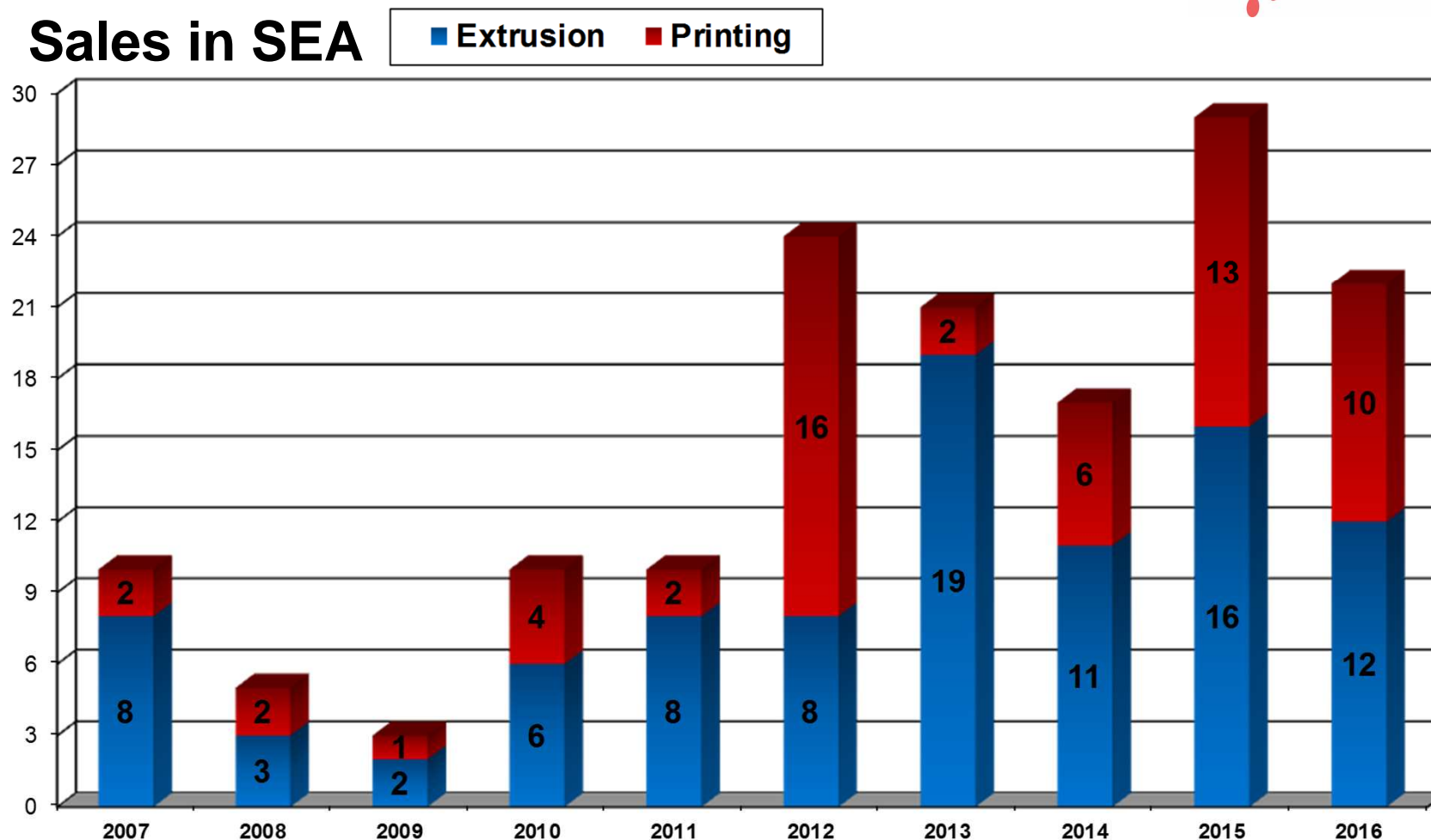
- Further investments in Gravure and Flexo
- Success with well known packaging producers mainly in HCMC area
- With rising GDP foreign investments were made in flexible packaging



What was achieved in Vietnam after our last Image to Print 2013



Sales in SEA



What was achieved in Vietnam after our last Image to Print 2013



- Vietnam, being historically a “rotogravure country” will now have major flexo printing investment of
 - 2 x VISTAFLEX
 - 1 x MIRAFLEX
 - 2nd hand NOVOFLEX
- We will support solutions to grow for inks, materials, anilox, plates ...
- ... and offer flexo-specific training for productive operations.





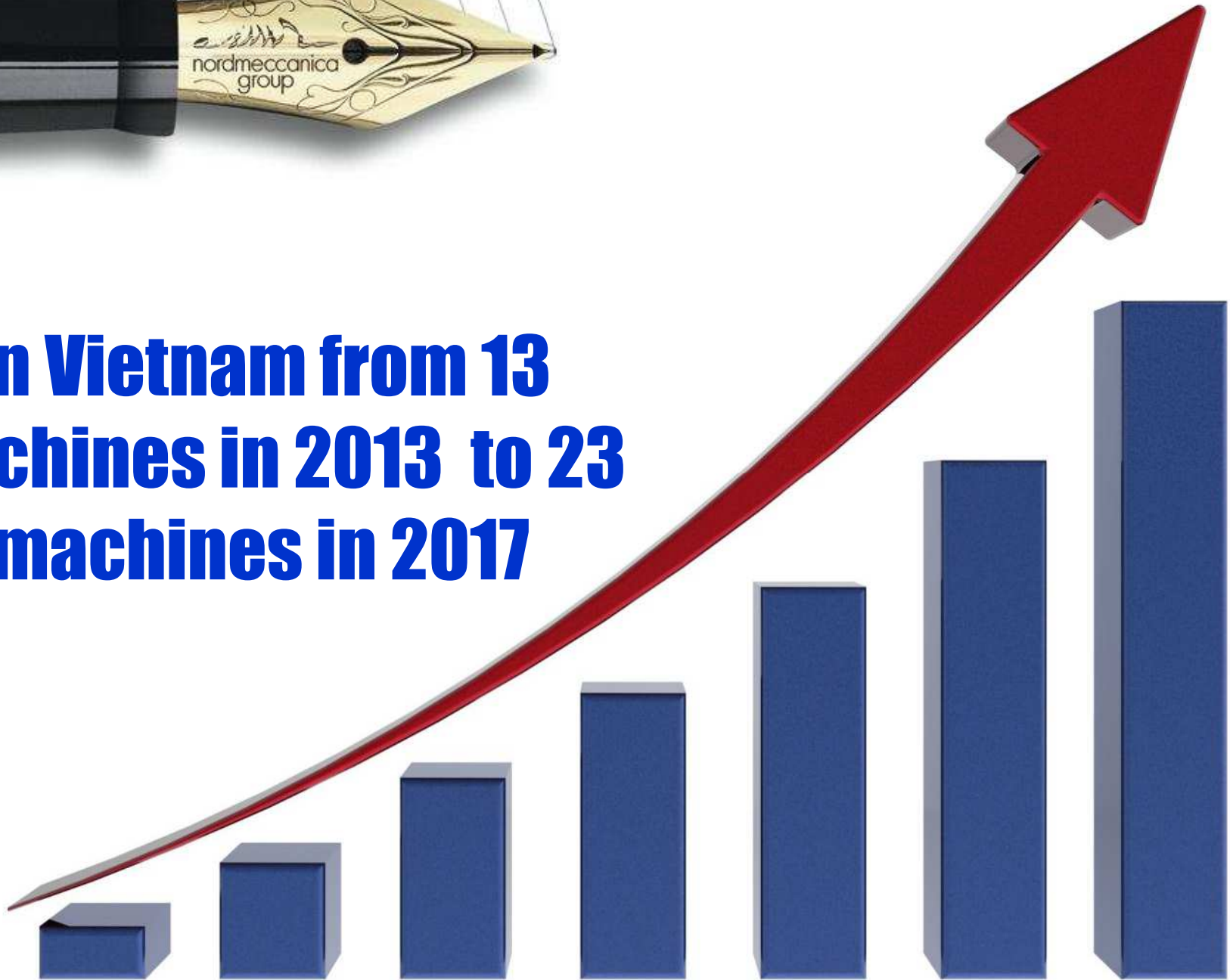
Worldwide Developments from 2013

- From 200 to 280 employees.
- 3 Locations, 7 Plants.
- Over 30,000 m² (330,000 sqf).
- Plant expansion: 2014-15-16
- From 65 M to 110 M Euro yearly sales (~300 machines delivered in one year).
- 70% Global Market Share from 2000 to 2900 machines worldwide.
- From 700 to more than 1100 machines in Asia Pacific
- 2013 Merging of Galileo and new company for high tech metallizer
- 2014 Sole supplier of Amcor Flexible AFAP
- 2015 Nordmeccanica India.
- 2016 New Factory in New York





**In Vietnam from 13
machines in 2013 to 23
machines in 2017**

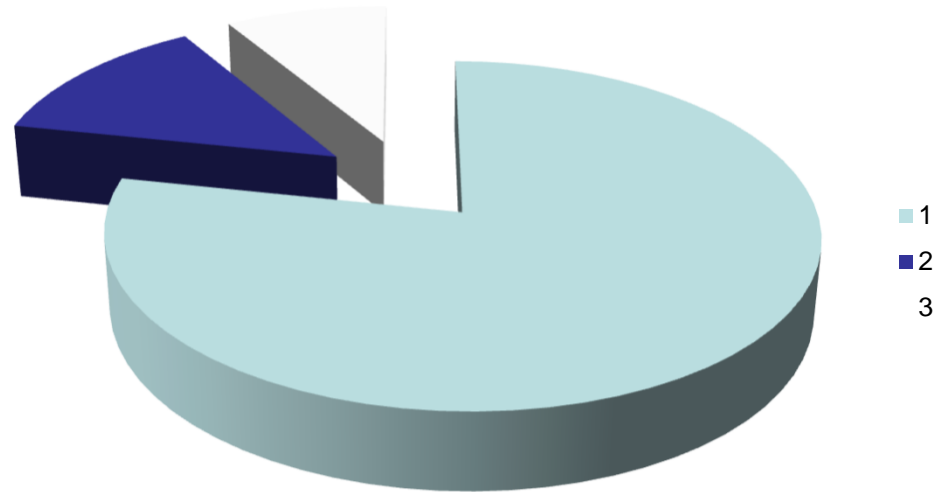


Machines Installed in Vietnam

18 Solvent less machines

3 Super Combi Machine (solvent based and solvent less)

2 Duplex Combi Linear Machines (solvent based and solvent less turret)



The increase of combi machines in the last years marks the evolution of the need of the end users , which are becoming more and more competitive and therefore they need more complex and functional machines



In Vietnam

Simplex Solvent Less

Super Combi

Duplex Combi Linear



Inks, coatings and pressroom products

Sun Chemical provides pressroom products for a variety of printing processes and markets:

Printing Processes

- Flexo
- Gravure
- Lithography
- Screen
- Digital
- Pad Printing
- Lamination Adhesives

Markets

- Packaging
- Offset/Commercial
- Publication
- Graphics/Displays
- Industrial
- Security/Brand Protection
- Printed Circuits
- Electronic Materials



The world's leading printers choose Sun Chemical

Improve productivity, stand out on shelf, and contribute to a more sustainable future with innovations in:

- Color Management
- Low Migration/Compliance
- Barrier Materials
- Pressroom Efficiency
- Credit/Laminated Card Solutions
- Special Effects
- Brand Protection
- Electronic Materials
- High Performance Inks



Proven and reliable solutions to lightweight packaging

Sun Chemical offers innovative barrier materials that lightweight packaging and have a direct effect on the shelf life and integrity of the product.

These include:

- Barrier coatings
- Barrier adhesives
- Coated films



Meeting the high quality demands when printing at very high speeds

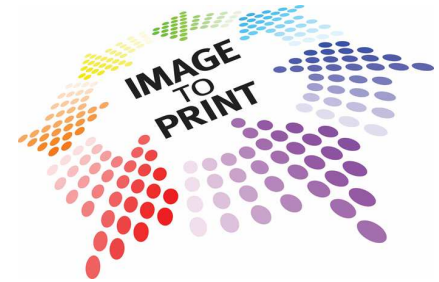
Sun Chemical's SunStrato® high performance lamination inks for pouches and other laminated bag structures produce high-quality graphics that pop off the shelf even when printed at very high press speeds. These inks offer:

- Strong adhesion
- Good bond performance on a variety of substrates
- Maximum color strength
- Low solvent retention
- Clean printing and film versatility



Janoschka

Janoschka Global Janoschka in the Asia-Pacific Region



- Janoschka Singapore Service Office
- Janoschka India Graphic Services
- New building and capacity increase at APE Malaysia
- New Factory with APE Vietnam
- Investment in latest Laser-Embossing technology
- ... /

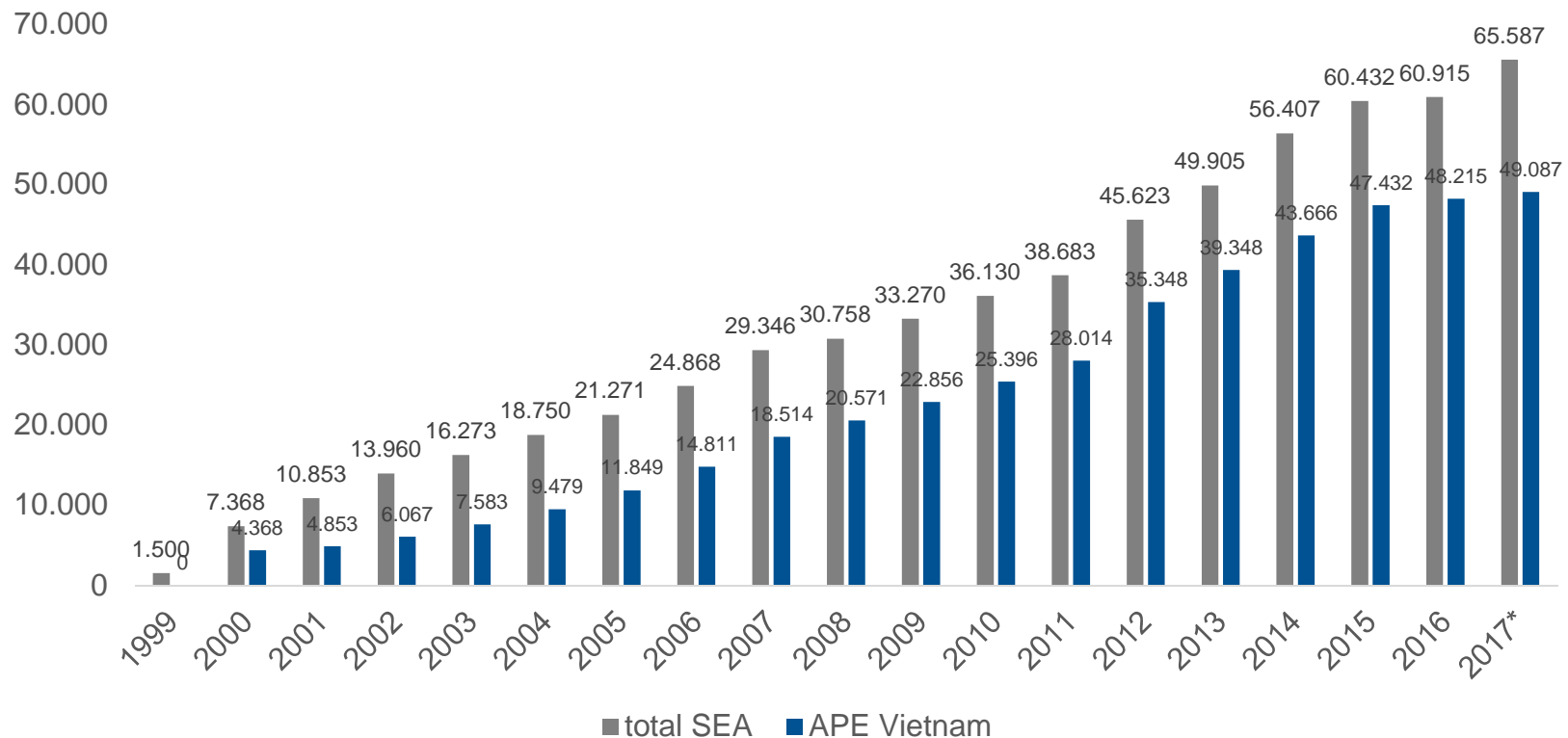
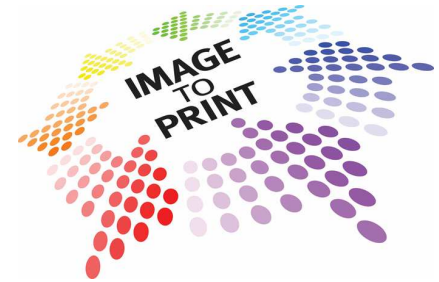


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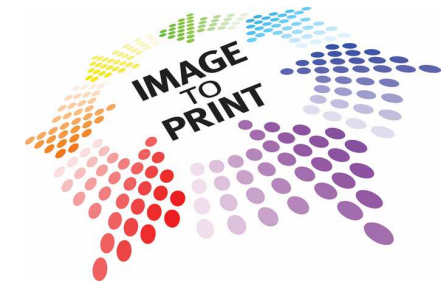
Number of cylinders produced
in South East Asia



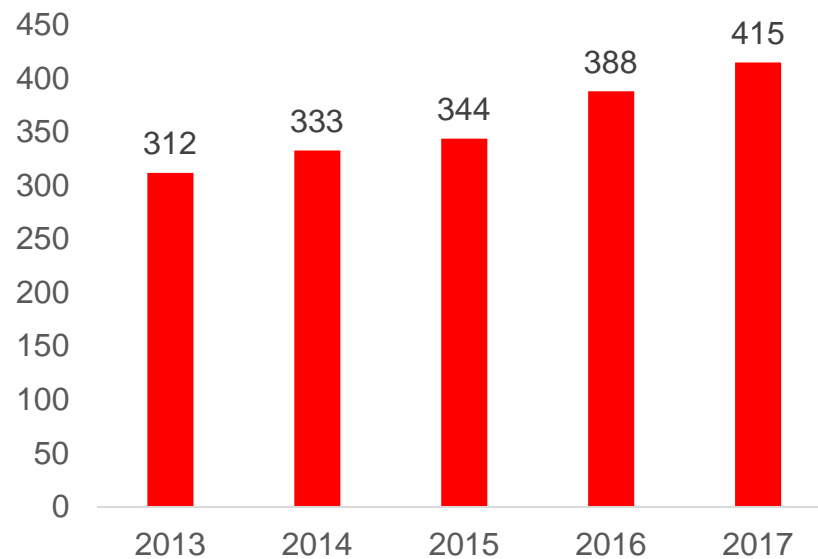
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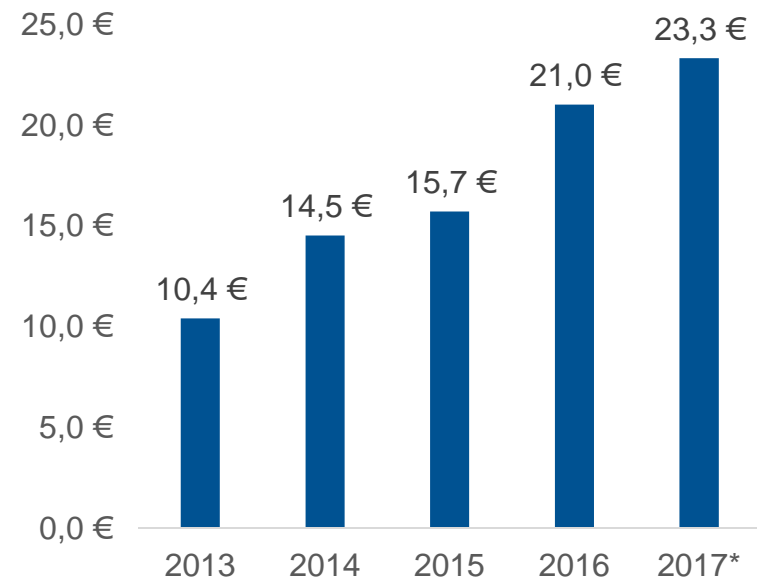
What happened since 2013...?



Headcount in SEA

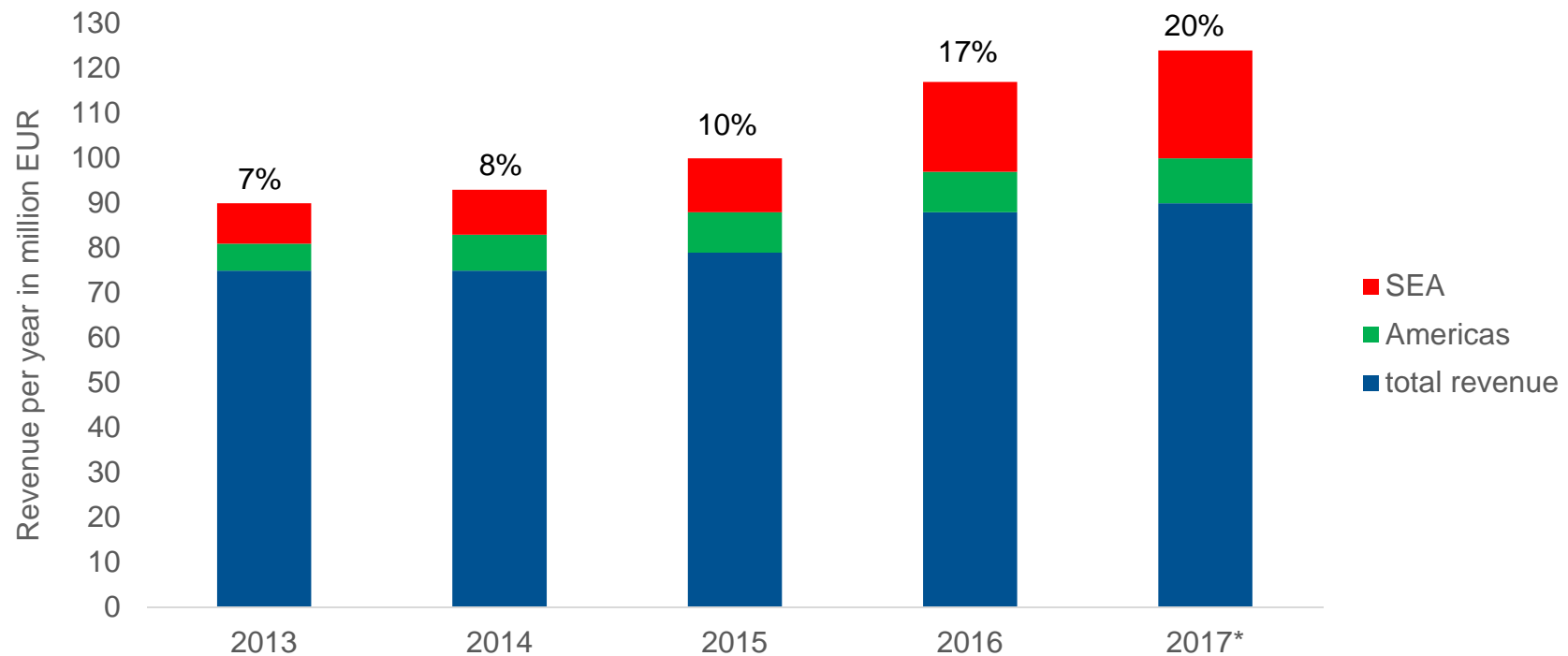
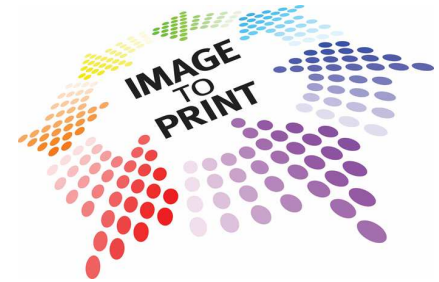


Revenue in SEA



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Growth of revenue and part of South East Asia



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Brief introduction to APE Vietnam & some guide for Factory tour

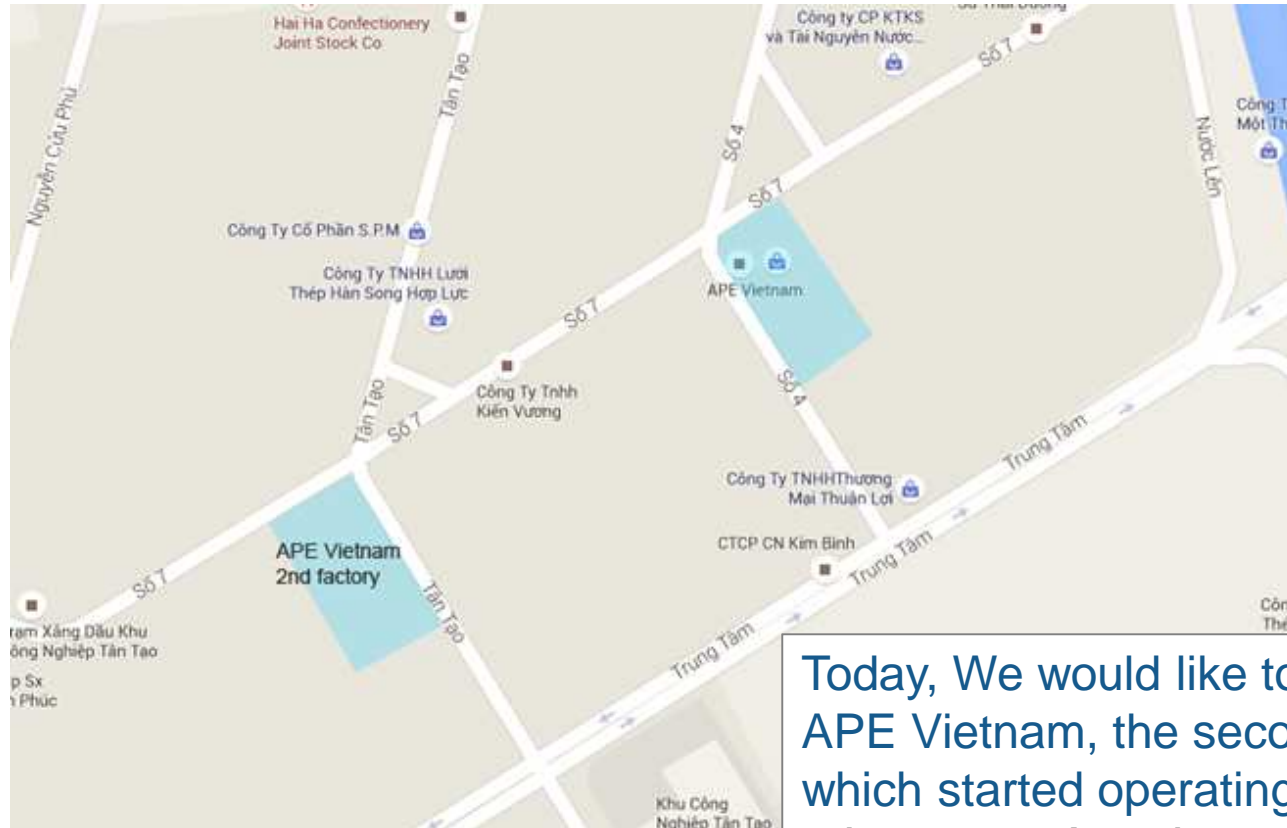


- APE Vietnam became a member of Janoschka group in 2010.
- APE Việt Nam trở thành thành viên của Janoschka group vào năm 2010
- Established by the joint venture between APE Malaysia – a member of Janoschka group and Hoang Kim joint stock company.
- Được thành lập bởi sự liên doanh giữa APE Malaysia – Thành viên của Janoschka và Cty cổ phần Hoàng Kim



- APE Vietnam located at Unit 16, 7th Road, Tan Tao Industrial Park, Ho Chi Minh city, Vietnam. Total area is 7000 m²
- APE Vietnam tọa lạc tại số 16, Đường số 7, KCN Tân Tạo, TP Hồ Chí Minh. Diện tích là 7000m²

- Since September 2016, the second factory of APE Vietnam with 8600 m² is in operation.
- Năm 2016, APE Vietnam đưa vào sử dụng nhà máy thứ 2 với diện tích 8600 m² tại địa chỉ 26A, Đường số 7, KCN Tân Tạo.



Today, We would like to invite you to visit
APE Vietnam, the second factory,
which started operating in September 2016
Hôm nay chúng tôi xin mời quý vị đến tham
quan nhà máy mới của chúng tôi.

- Buses are waiting for us outside of hotel
- Xe buýt đang đợi sẵn quý vị bên ngoài khách sạn
- Please follow the guide of APE Vietnam's during the factory tour
- Xin theo sự hướng dẫn của nhân viên APE Vietnam trong quá trình tham quan nhà máy.
- Taking photos is prohibited
- Không được phép chụp hình.





- Evacuation + meeting points to be respected; Stay with your host
- xin quý vị lưu ý điểm tập kết. Và luôn theo sự hướng dẫn
- smoking only in restricted areas
- Hút thuốc là chỉ được phép ở khu vực chỉ định

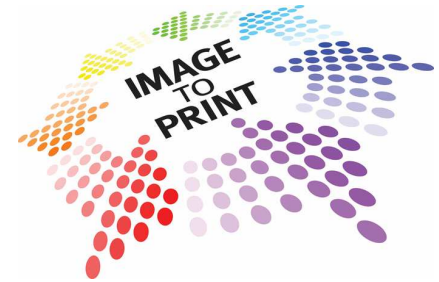
In addition during factory tour:

Khi tham quan xin lưu ý thêm:

- no usage of safety shoes, so stay within the marked pathway
- Khi không mang giày bảo hộ, xin chỉ đứng trong khung vạch đi bộ
- stay with your guide
- Tuân theo sự hướng dẫn của người hướng dẫn
- no food, no open fire
- Không mang thức ăn, không bật lửa
- not touching operating equipment, stay away
- Không chạm vào thiết bị đang vận hành, đứng tránh xa thiết bị



- After the company visit, coffee & snacks will be served,
and we will be there for any question and further discussions
- Xin mời dùng tiệc nhẹ trước và sau khi tham quan.
- The factory tour will be end at about 5:00 pm.
Buses will take you back to New World Hotel
- Buổi tham quan kết thúc lúc 5:00. Xe buýt xe đưa quý vị trở về khách sạn New World



- Tonight at 6.00 pm we invite all registered guests for welcome drinks and cocktails, followed at 7.00 pm by a Gala Dinner including music, show program and a lucky draw.
- Vào lúc 7:00 tối nay, có buổi tiệc tối Chiêu đãi tại khán phòng này, Có rút thăm trúng thưởng may mắn. Trước buổi tiệc có tiệc cocktails chiêu đãi quý vị lúc 6:00
Xin trân trọng kính mời quý khách tham dự.



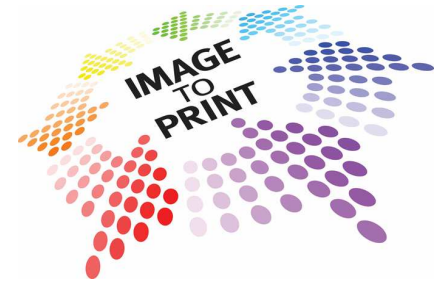
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Thank you for your attention !

Xin chân thành cảm ơn

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What has happened since 2013...?

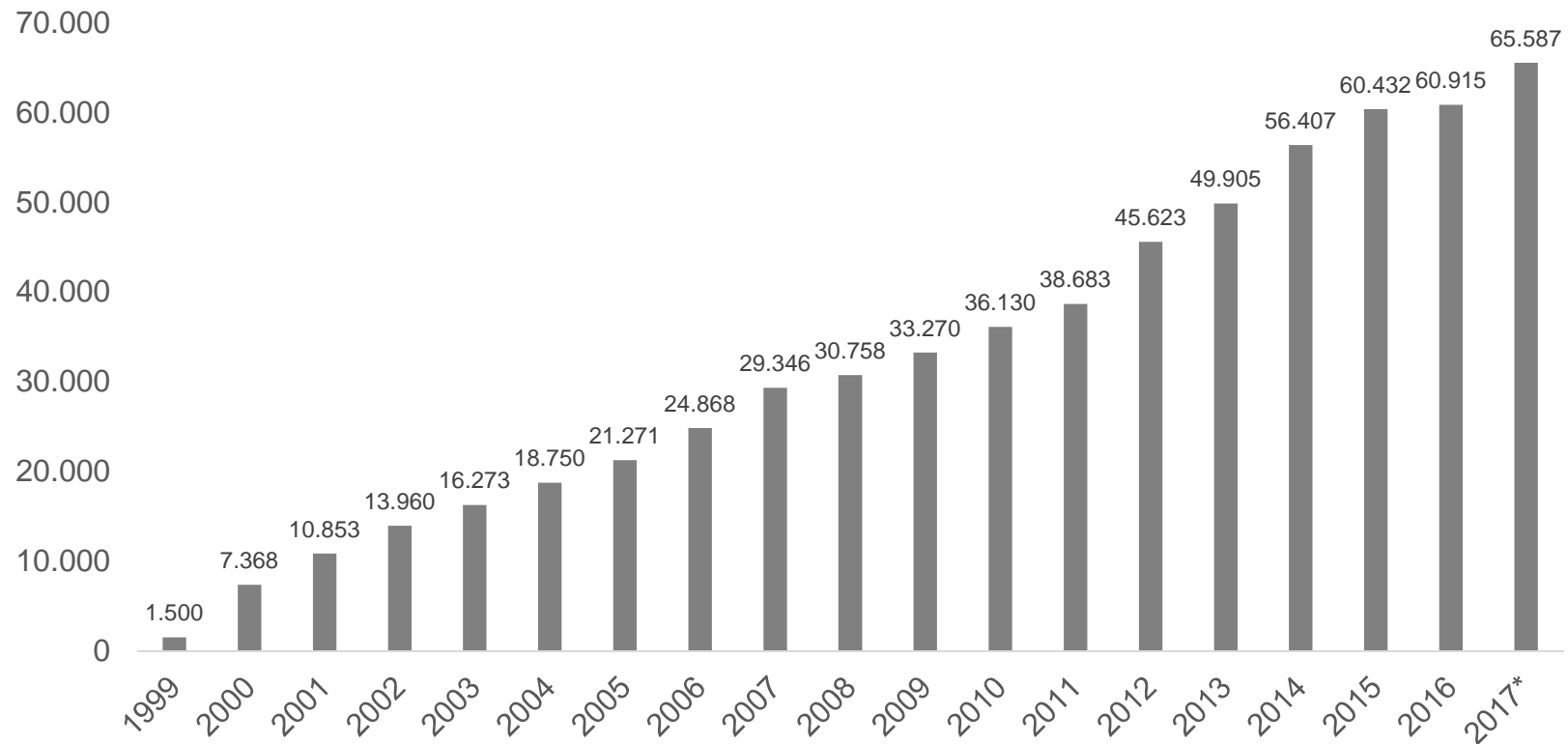
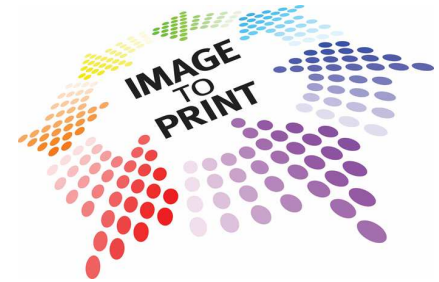


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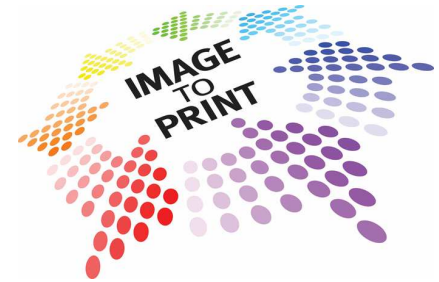
Number of cylinders produced
in South East Asia



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Janoschka



Janoschka joint-venture in Vietnam

**“The training of people,
and the exchange between people,
will be the key factor to our success”...**

Rudi Weis-Schiff
April 4th 2013



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