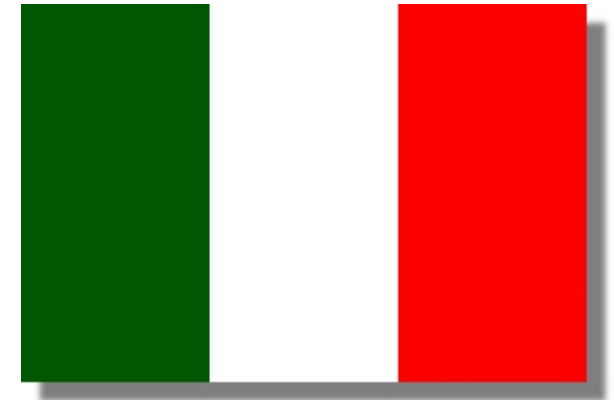
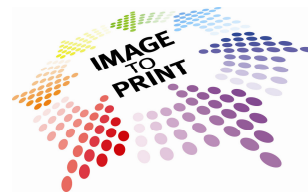


# Your supplier for rotogravure and flexo printing, extrusion and converting equipment



## Image-to-Print Rotogravure Technology & Innovation Days

Piacenza,  
19th-20th June 2013



**WINDMÜLLER & HÖLSCHER**

# WINDMÖLLER & HÖLSCHER at a glance



- World market leader offering sophisticated solutions for flexible packaging - extrusion, printing, conversion
- More than 50 different machine types
- About € 550 million worth of sales in the W&H group world wide
- 2000 employees at 16 locations
- Headquarters in Lengerich
- Founded: 1869
- Legal form: Limited partnership



# Our LENGERICH Facilities



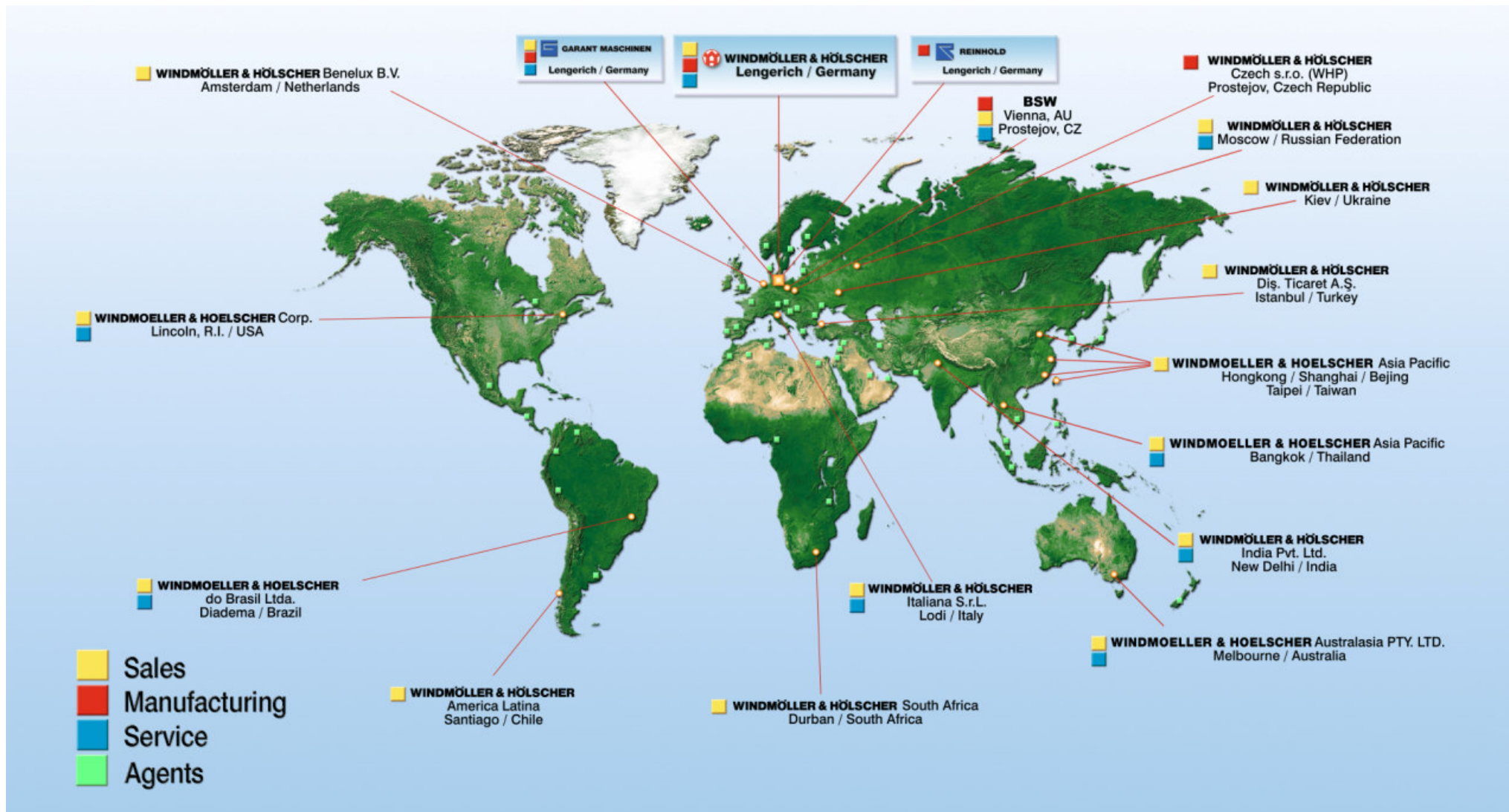
- Headquarters
- Research & Development
- Engineering + Production
- Sales
- Service
- 70,000 square meters



**WINDMÜLLER & HÖLSCHER**



# We are where our customers are.



**WINDMÖLLER & HÖLSCHER**



# Our customers: The population of the world



# Flexible packaging markets 2013



COUNTRY / REGION	Flexible Packaging Consumption \$bn.	% Share	Growth Rate % change
Europe	14.2	31	2%
N America	14.6	31	4%
C & S America	2.8	6	4 – 5%
Asia Pacific	13.5	29	8%
Africa / Middle East	1.4	3	5%
<b>TOTAL</b>	<b>46.5</b>	<b>100</b>	<b>5%</b>

**FPE** Flexible  
Packaging  
Europe



**WINDMÖLLER & HÖLSCHER**

# GDP forecasts out to 2017 (IMF)

	2011	2012	2013	2014	2015	2016	2017
United States	15,094.03	15,609.70	16,221.38	16,940.57	17,783.57	18,705.03	19,704.59
China	11,299.97	12,387.05	13,679.69	15,094.13	16,670.13	18,389.43	20,336.09
India	4,457.78	4,824.55	5,254.58	5,734.58	6,276.24	6,873.98	7,574.46
Japan	4,440.38	4,588.97	4,737.82	4,881.46	5,024.26	5,164.17	5,324.57
Germany	3,099.08	3,158.09	3,253.03	3,342.59	3,440.15	3,540.28	3,655.13
Russia	2,383.40	2,510.79	2,648.98	2,793.75	2,950.16	3,113.01	3,295.42
Brazil	2,294.24	2,393.95	2,530.97	2,671.11	2,825.68	2,988.37	3,170.62
United Kingdom	2,260.80	2,308.50	2,391.04	2,488.19	2,594.13	2,707.36	2,838.32
France	2,217.90	2,257.02	2,314.21	2,391.92	2,476.40	2,565.45	2,667.90
Italy	1,846.95	1,834.95	1,857.30	1,894.18	1,943.90	1,999.06	2,062.41
Mexico	1,661.64	1,743.47	1,834.44	1,932.47	2,028.53	2,128.97	2,242.46
Korea	1,554.15	1,629.90	1,719.90	1,815.14	1,918.43	2,026.84	2,148.00
Canada	1,396.13	1,443.11	1,496.60	1,554.63	1,617.85	1,682.14	1,753.11
Spain	1,413.47	1,405.44	1,428.45	1,466.30	1,514.37	1,566.02	1,625.90
Indonesia	1,124.65	1,208.54	1,307.78	1,418.66	1,542.34	1,677.00	1,829.29
Turkey	1,073.57	1,112.27	1,164.84	1,229.54	1,303.51	1,384.65	1,476.55
Islamic Republic of Iran	990.219	1,006.54	1,034.69	1,067.34	1,105.98	1,146.21	1,191.80
Australia	914.482	954.296	1,002.64	1,053.01	1,107.43	1,164.65	1,228.68
Taiwan Province of China	876.035	919.027	976.857	1,038.64	1,105.95	1,178.94	1,261.48
Poland	771.658	802.145	840.214	883.687	932.853	983.685	1,041.17
Argentina	716.419	756.226	798.229	844.191	894.529	949.218	1,010.94



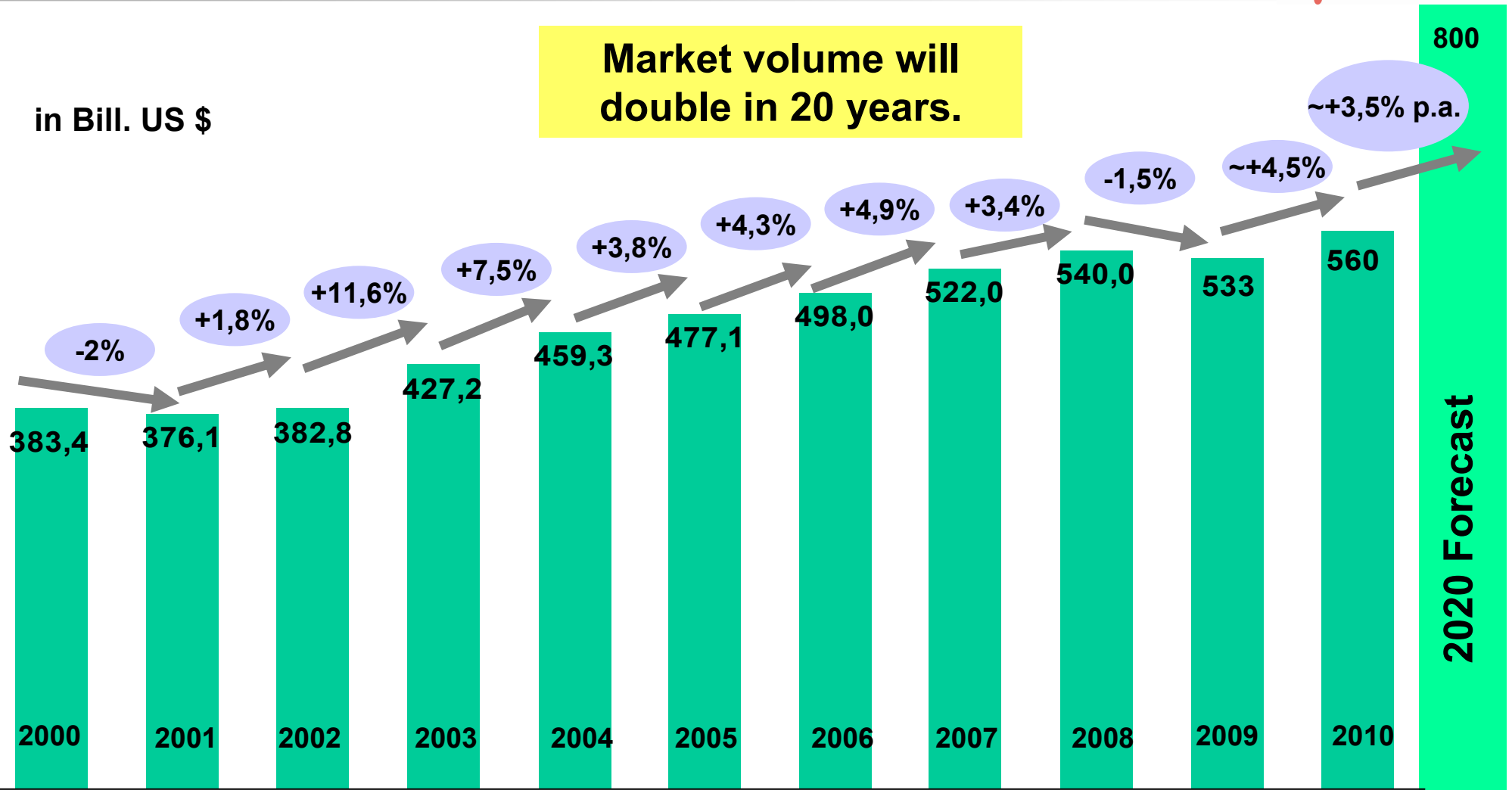


# Steady growth of packaging markets



in Bill. US \$

Market volume will  
double in 20 years.



Quelle: Pira International

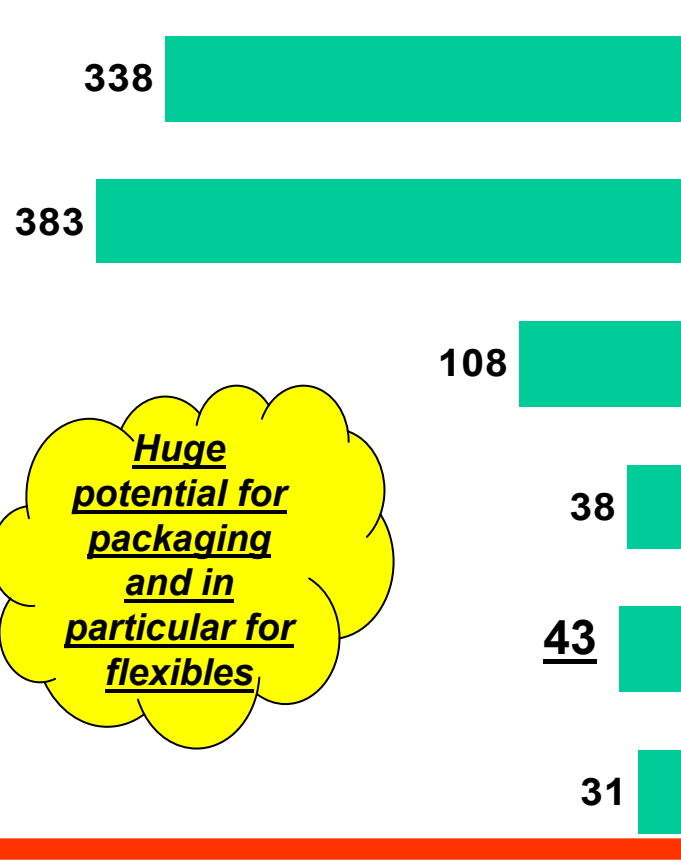


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# Per capita consumption of packaging material



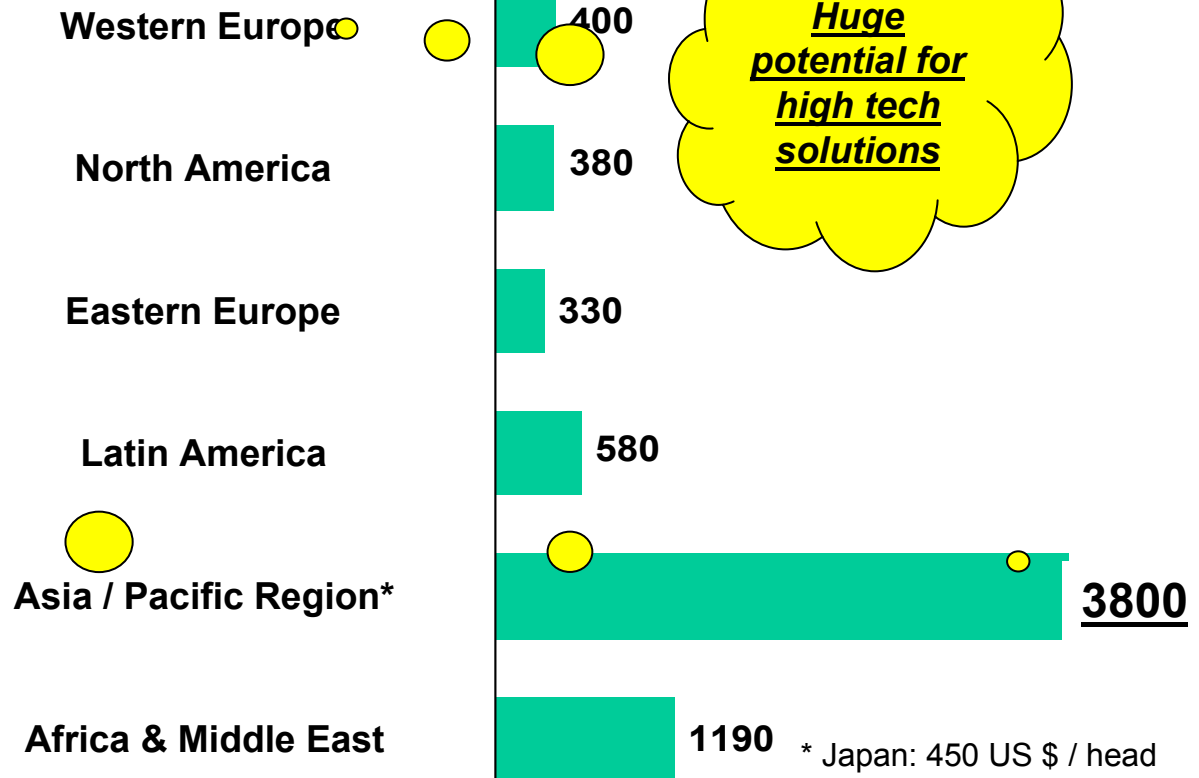
In US \$ per head (2011)



**Huge potential for packaging and in particular for flexibles**

Region

Population in million ( 2011)



**Huge potential for high tech solutions**

\* Japan: 450 US \$ / head



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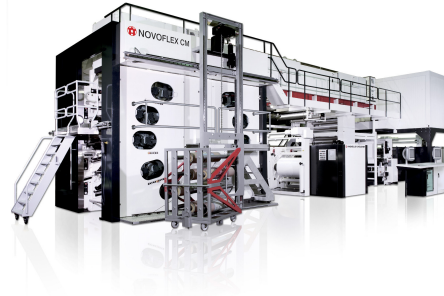
# Two printing processes for flexible packaging



## Flexo



**VISTAFLEX**



**NOVOFLEX**



**MIRAFLEX**

## Rotogravure



**HELIOSTAR**





# Our CI-flexo press portfolio



**250 MIRAFLEX-  
sold in 5 years**



**WINDMÖLLER & HÖLSCHER**

# One of the leading roto printing presses



**>120 HELIOSTAR G + S machines sold**  
**>20 within the last 12 months**



**New HELIOSTAR SH - installation in  
Southern Europe**



**WINDMÖLLER & HÖLSCHER**



# HELIOSTAR SL 8 in printing technology center



**WINDMÖLLER & HÖLSCHER**

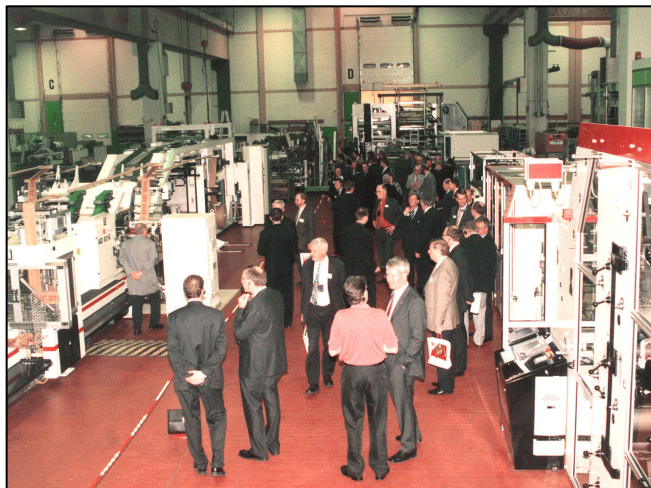
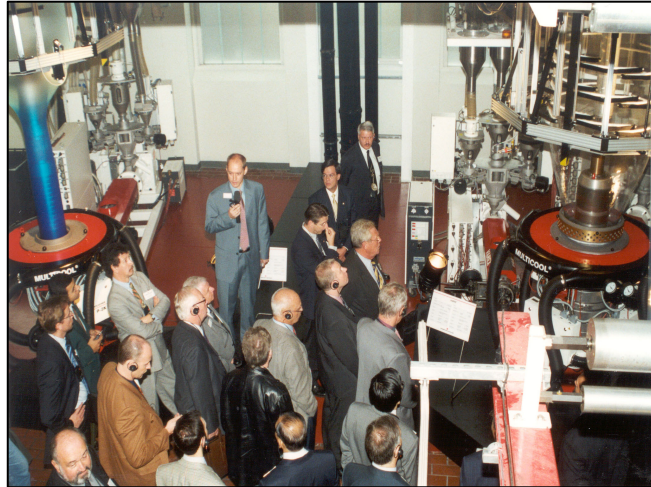


# W&H printing technology center



The latest engineering and system technology presented at the 5,000 m<sup>2</sup> W&H technology center

- Demonstration/tests for customers
- Training
- Application development
- R&D



# We are investing into the future



## Research and Development:



- approx. 8% of total turnover
- more than 300 employees
- more than 1,500 patents



**WINDMÜLLER & HÖLSCHER**



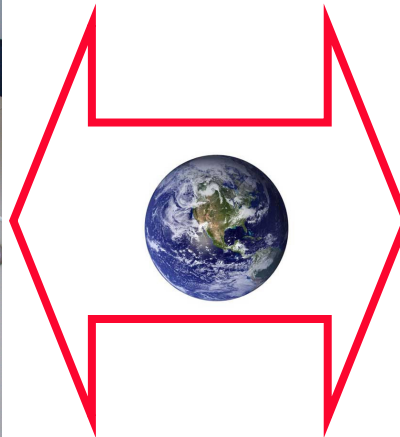
# W&H service and customer's support

- 24-hour IDC and hotline service world-wide
- W&H Teleservice / Remote Service
- Comprehensive spare parts store
- W&H service engineers in all regions
- Training of our customers' operators and maintenance personnel
- Start-up and application support
- Production support
- Preventive maintenance service agreements





# W&H Remote-Service and Tele-Hotline



- Troubleshooting with support of Information- and Diagnostic Center
- Hotline number +49 5481 14 -3333, daily 24 hours, german / english
- Communicating with W&H Service-Notebook, Headset, Webcam



# The W&H team for printing presses : ready to serve you!



Foto Kiepkor



# Our technicians and service support in Italy



**W&H  
Italiana**

**Resident service  
engineers for printing,  
extrusion and converting**



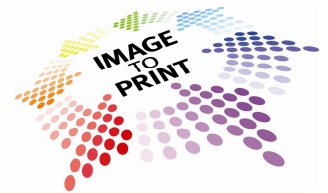
**WINDMÖLLER & HÖLSCHER**



# Good reasons for you to invest in W&H equipment

**It is not only high speed and output, but it's:**

- One of the best qualities in printing equipment for best printed product
- Extensive customization
- State-of-the-art machine layout and design, operator friendly
- Proven components
- Highest safety standards
- Adherence to schedules, prompt delivery,  
detailed preparation and organisation of installation,  
short time from rigging to acceptance runs with binding criteria



**Besides technology, profitability ...  
... W&H is concentrating on sustainability**



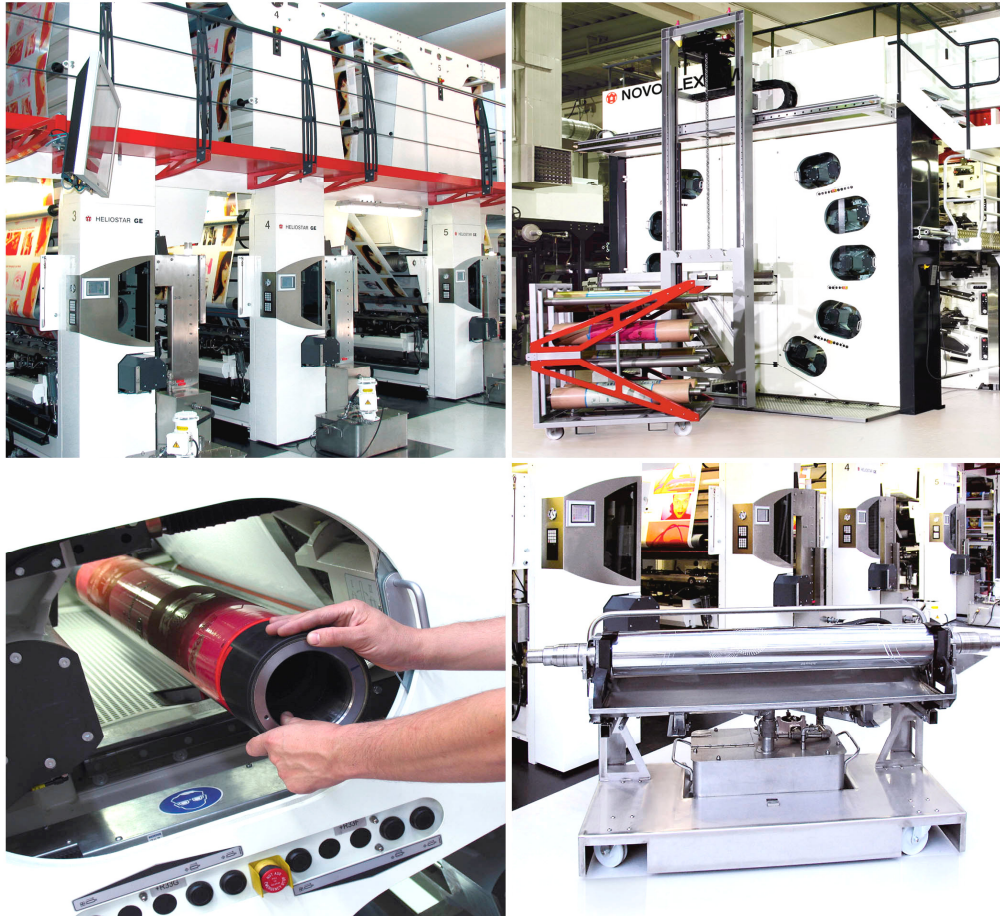
**W&H will focus on:**



**W&H will continue saving energy, reducing  
emissions and protecting our environment.**



# Image-To-Print Technology and Innovation



**Still challenging to keep  
ahead in our world of  
flexible package printing!**

**Thank you for  
your attention!**

