Heidelberg/Gallus: Market and Outlook Labelexpo 2019

Media Day at INSIGINS-Etiketten, Vienna
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Topics

1. Gallus – A Heidelberger Group Company

2. Label Business

3. Why hybrid printing

4. Gallus at Labelexpo 2019 – Preview
Gallus – A Heidelberg Group Company

Integration
All Gallus Sales and Service Units are integrated into Heidelberg’s service structure

Worldwide presence
Gallus has unlimited access to the worldwide network of the Heidelberg Group

Innovations
Access to the worldwide Heidelberg research and innovation network

Shaping the digital change together
New digital services: Heidelberg Assistant, Gallus mCall

Production
Assembling of series products in Wiesloch, Germany
Gallus at a glance

Key Figures
Sales by region:
• 46% Europe
• 23% Americas
• 14% EE/NME
• 17% Asia

Staff
ca. 340 world wide including (incl. 21 apprentices)
213 St. Gallen
22 Herisau
107 Langgöns

Sites
St. Gallen (CH)
Headquarters
Herisau (CH)
Langgöns (D)

Sales Organization
Heidelberg & Gallus Sales and Service Units all over the world
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Worldwide Label Businesss – a Growing Market

- **Worldwide demand in 2018:**
  - 64 million sqm
  - 27.7 Billion US$

- **Growth worldwide remains stable in 2018:** 4.4%

- **Pressure Sensitive Labels as leading labeling technology by 40% share**

Source: AWA

*Global Demand for Labels in Volume by Region, 2018*
Pressure Sensitive Label Market

- Europe is the second-largest label market in the world: 30% share
- Estimated growth in Europe up to 2021: 4.0%,
- European growth is driven by Eastern Europe 7% (2018)

Source: AWA
Label Market by End-use Segment

End-use segments

Food and Beverage represent by far the main segments: 67%

Source: AWA
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Why hybrid printing?

Digital label printing with integrated inline finishing and die cutting

Hybrid Printing System

From file to the finished label in one pass.
Streamlined workflow

Digital Only Printing Machine Systems need at least one more pass for:

- White underlay (flexo/screen)
- Coldfoil
- Spotcolor
- Primer
- Die cutting
Why hybrid printing?
Digital label printing with integrated inline finishing and die cutting

More than 70% of digital jobs require more than one production pass caused by finishing and die cutting!

Source:
TLMI NA Digital Label Study
Feb. 2015, N = >100
Why Hybrid Printing?

Digital label printing with integrated inline finishing and die cutting

Customer expect more flexibility from print shops

With Hybrid Printing print shops are able to offer new concepts
• Personalized or versioned labels

Hybrid printing brings the label faster to the Point of Sales
• From file to finished label in one pass, without any second treatment

Every label is unique
• By random or industrial and full variable Data Printing

Hybrid printing is smart printing
• What you print is what you get
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Preview
Gallus @ Labelexpo

24 - 27 September • Brussels
LABELEXPO EUROPE 2019
www.labelexpo-europe.com
Preview Labelexpo 2019
Preview Labelexpo 2019

Gallus Labelmaster 8 colors

Gallus Labelmaster Advanced 10 colors
Preview Labelexpo 2019

**Gallus Labelmaster 8 colors**

**New:** Digital Prinbar
- Shiftable Inkjet printing unit for high opaque digital white
- Digital insetting
- Printing width of 430 mm (17 ”)
- Can be integrated in Gallus Labelmaster, Gallus RCS 430, Gallus Labelfire.
- Flexible use for e.g. changing languages
- No additional hardware needed.

**Fast Job Changes**
- Job change in less than 9 minutes
Gallus Labelmaster Advanced 10 colors

New: Rotary Die-Cut Unit, Quick
• Fully Frontloaded Rotary Die-Cut Unit
• Die cylinder change in less than one minute
• New change exchange trolley system

Highest Flexibility
• Complete process exchange of a printing unit in less than 10 minutes

Screen printing
• Gallus Screeny A-line
Preview Labelexpo 2019

Gallus Labelfire

New: Printing of full-variable data (fVDP)
- A self-adhesive label changes the design while printing process, depending on the type and quantity of the ingredients.

Industrial variable data printing (iVDP)
- Default with Gallus Labelfire for barcodes, 2D codes, serialized or personalized labels

New: Now available in 4-color equipment
- Optionally plus Digital white

New: Speed at 70 m/min
- In combination with a rotary die-cut unit

New: Low Migration inks
- For Food Packaging
We look forward to meeting you again in Brussels and please remember:

Labelexpo starts already at Heidelberg in Wiesloch.

Tailor-made solutions
- In-mold
- Wet-glue
Thank you very much for your attention.