



Heidelberg/Gallus: Market and Outlook Labelexpo 2019

Media Day at INSIGINS-Etiketten, Vienna

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Topics

1. Gallus – A Heidelberg 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

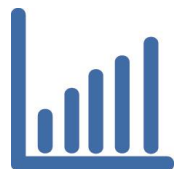
→ **Shaping the digital change together**

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



Topics

1. Gallus – A Heidelberger Group Company

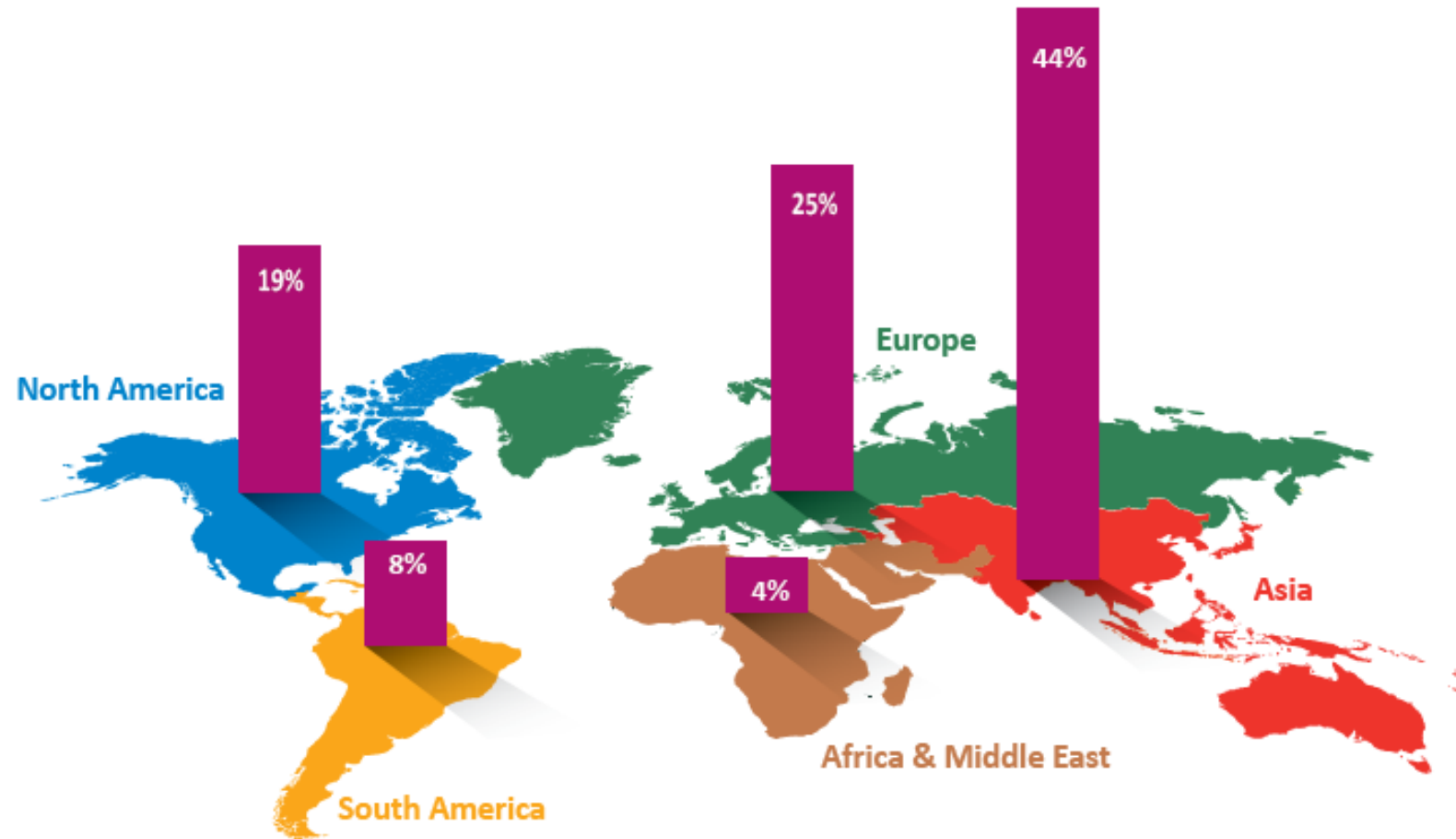
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Worldwide Label Business – a Growing Market

- 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

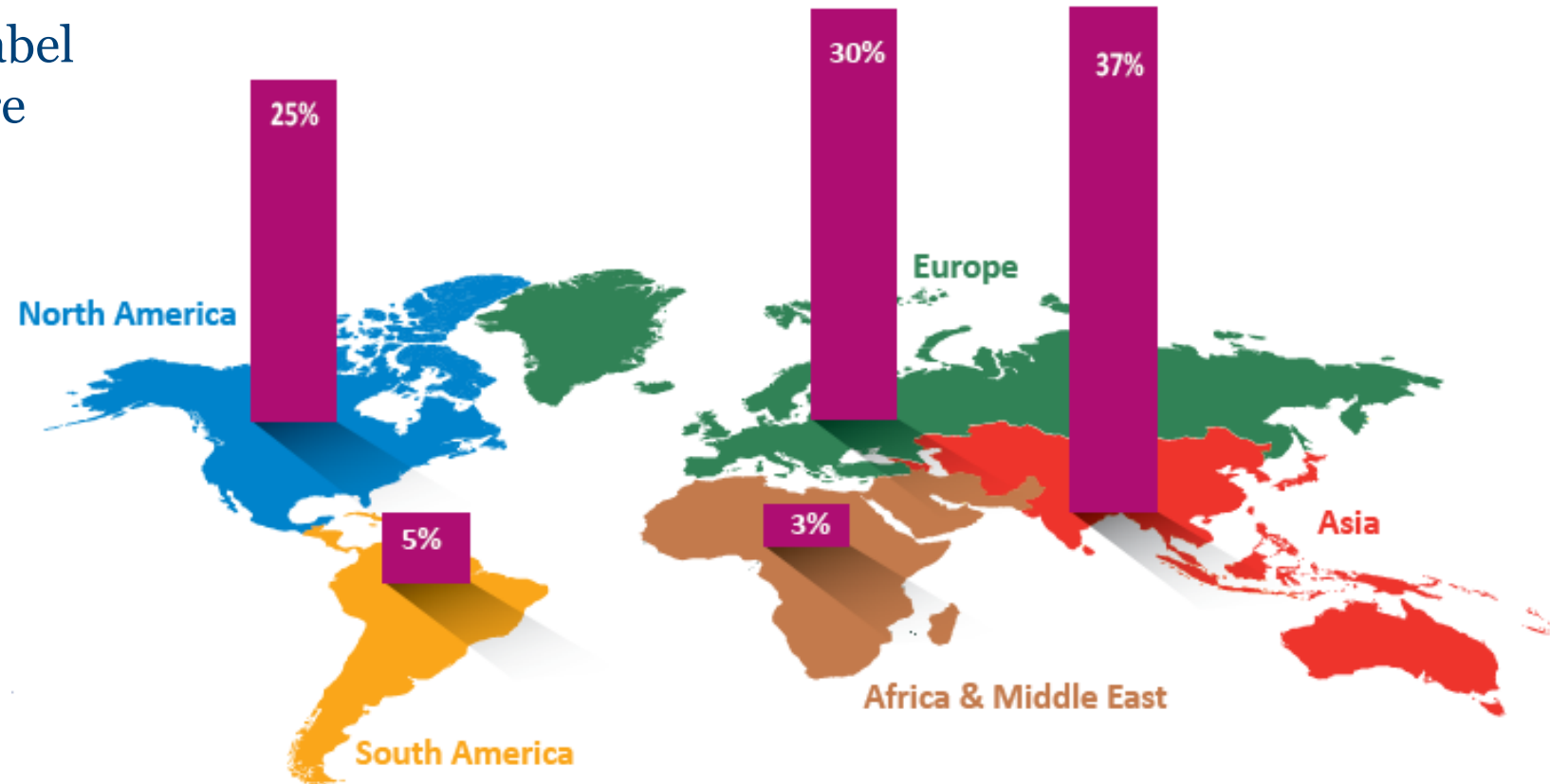


Global Demand for Labels in Volume by Region, 2018

Source: AWA

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)



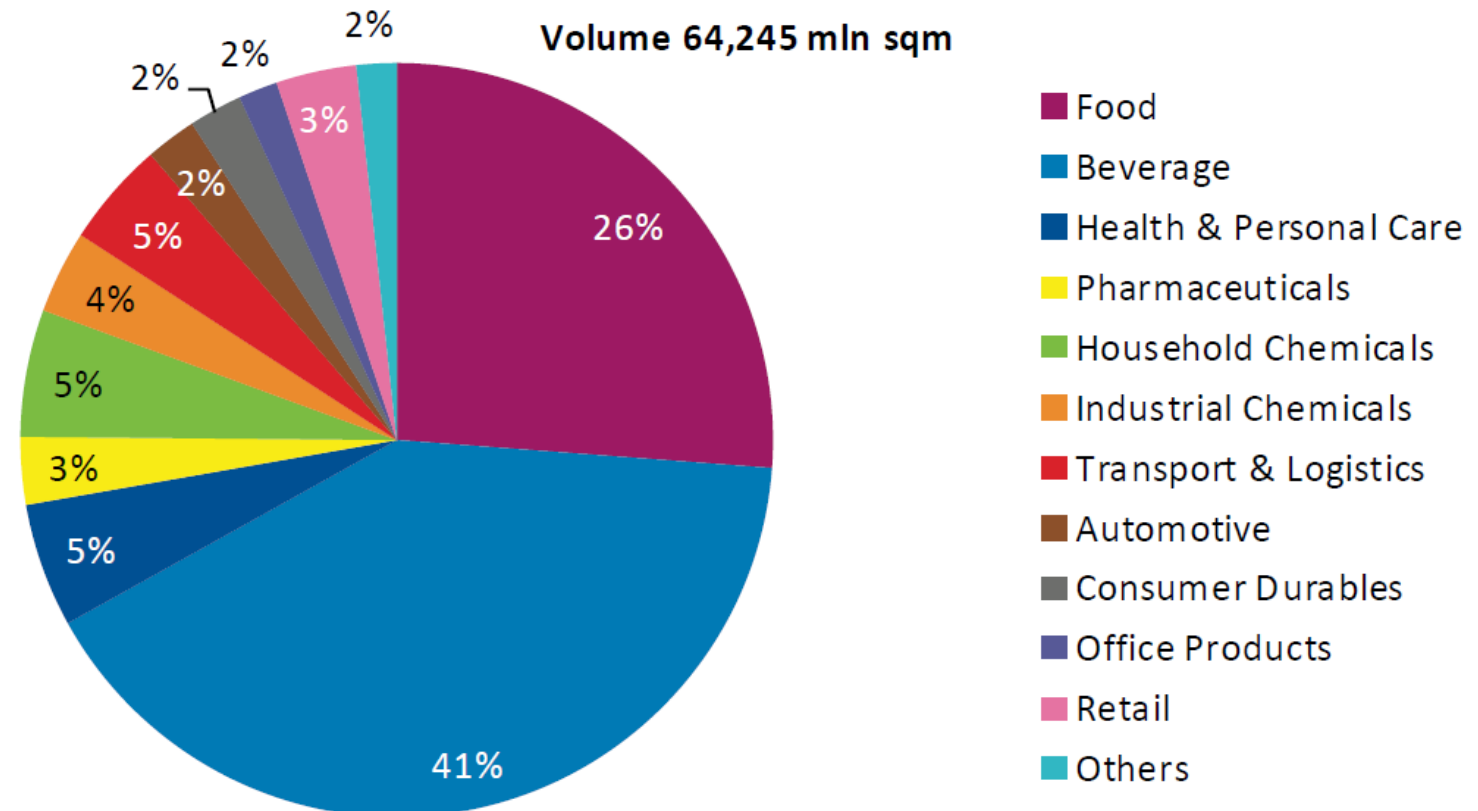
Source: AWA



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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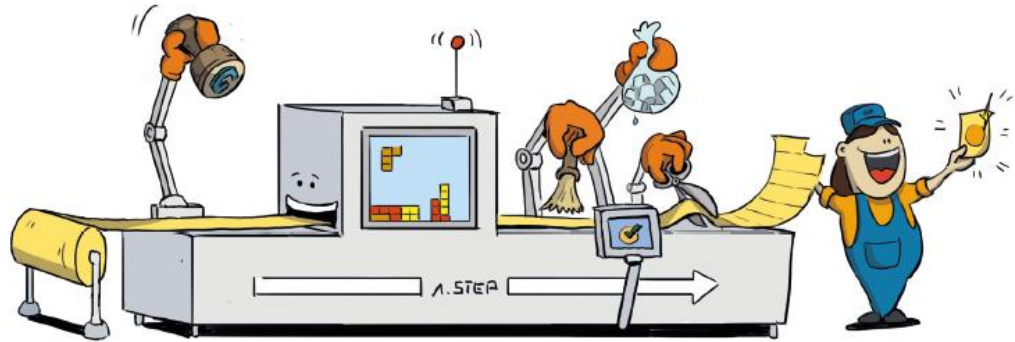
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Why hybrid printing?

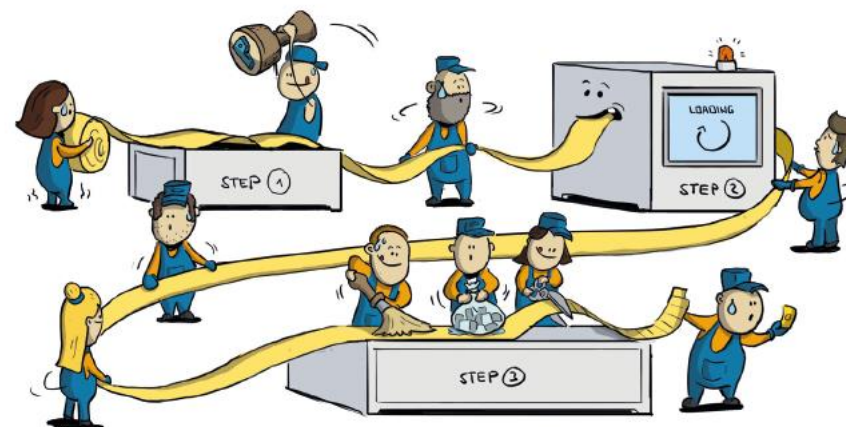
Digital label printing with integrated inline finishing and die cutting



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

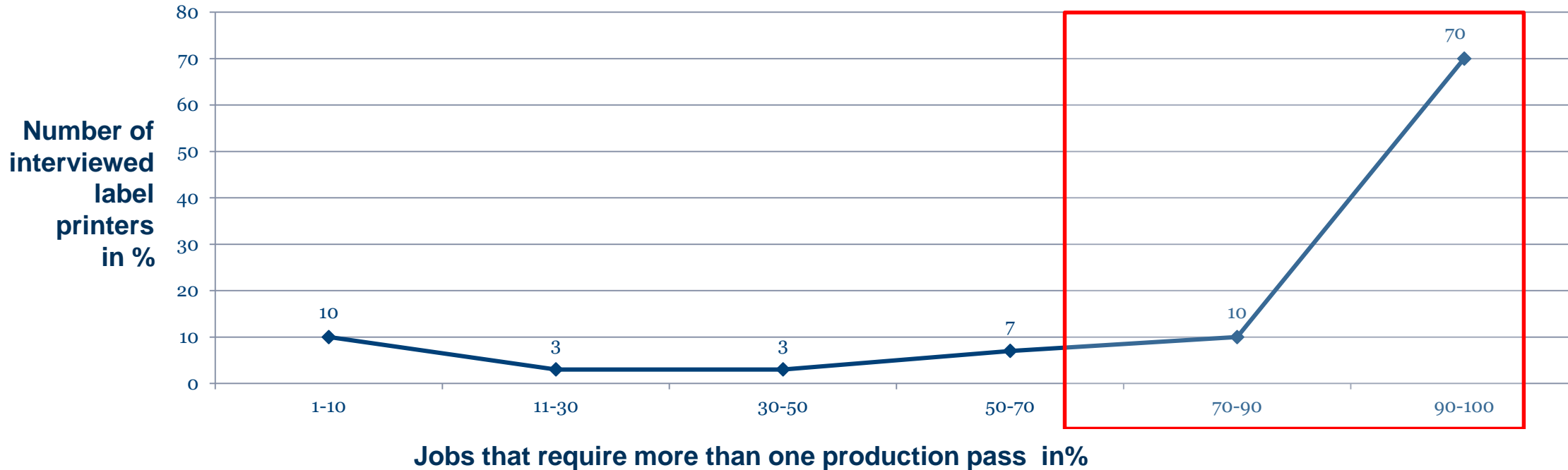
Primer

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

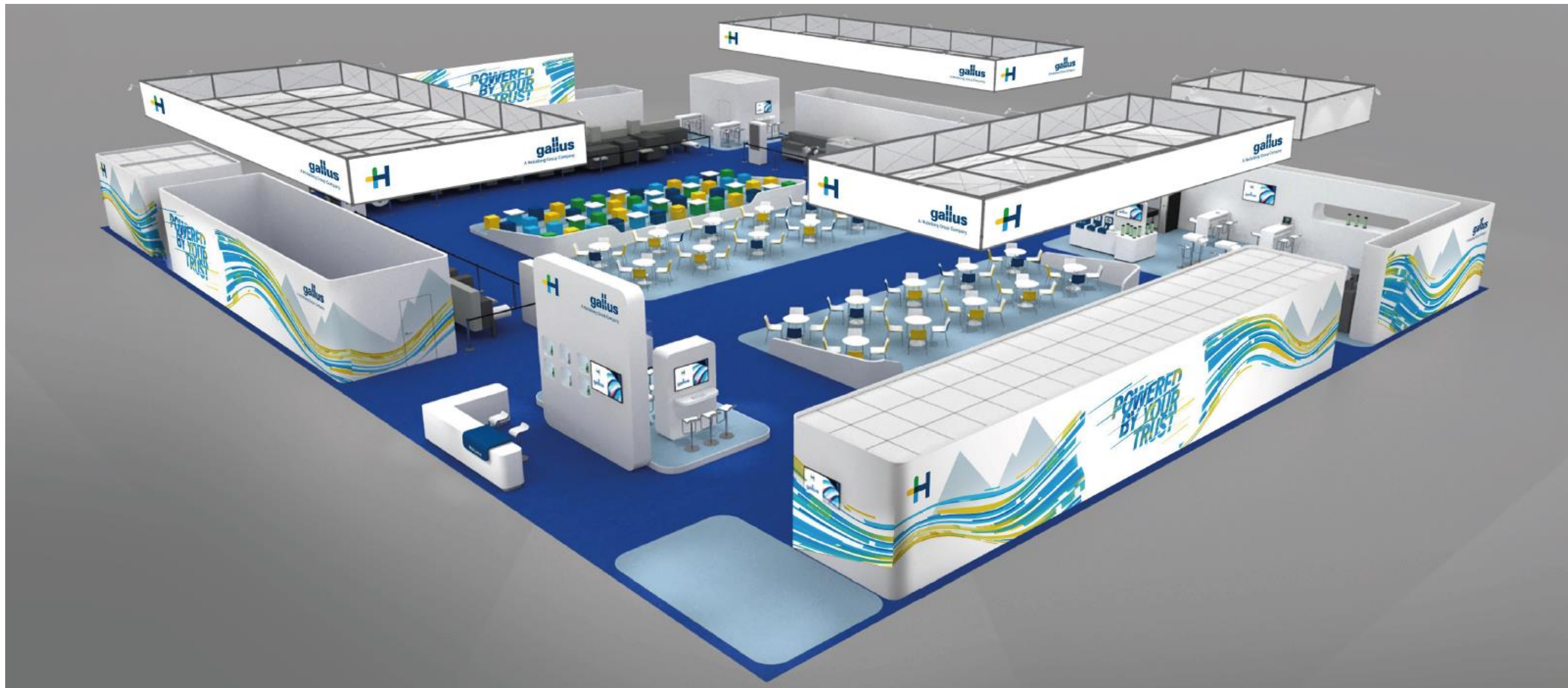
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Preview Labelexpo 2019



gallus
A Heidelberg Group Company

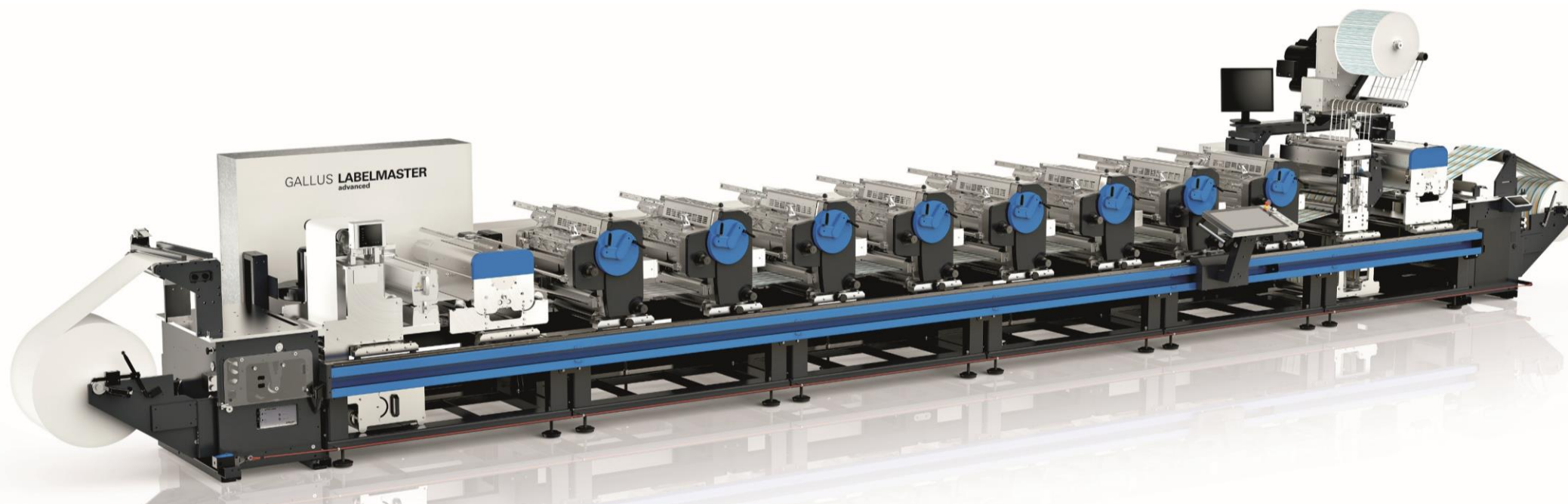




Preview Labelexpo 2019

→ 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 inseting
- 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



Preview Labelexpo 2019

→ 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.

