

The Rise of Digital

Packaging, today and tomorrow.

SHIFT Packaging Conference 2024 Ho Chi Minh, Vietnam

Graphic Communications Business Division

SHIFT Packaging Conference 2024 | Ho Chi Minh, Vietnam | 8 November 2024

Meet the Speaker:

SCOTT MACKIE

General Manager, Graphic Communications Business
FUJIFILM Business Innovation Asia Pacific and
Senior Group Manager International Sales and Marketing

In a 30-year career spanning Europe the Middle East and Asia Pacific, Scott's career has focused on driving transformation in the printing industry for the last 19 years, enabling businesses to create hybrid or completely digital production.

Starting out in Commercial Print and Packaging, joining the digital revolution in 2005 he is now Graphic Communications General Manager in Asia Pacific, and a Senior leader of their international expansion team driving digital change globally.



Fujifilm Graphic Communications Division

SHIFT Packaging Conference 2024 Ho Chi Minh, Vietnam

A history of innovation





Imaging



Industrial



Data



Healthcare

The background is a complex, abstract composition of glowing, multi-colored lines in shades of blue, yellow, and pink. These lines intersect and overlap, creating a sense of depth and movement. A faint, white network diagram with nodes and connecting lines is visible in the background, adding a technological or digital feel to the overall image.

Digital Transformation



Commercial



Photographic

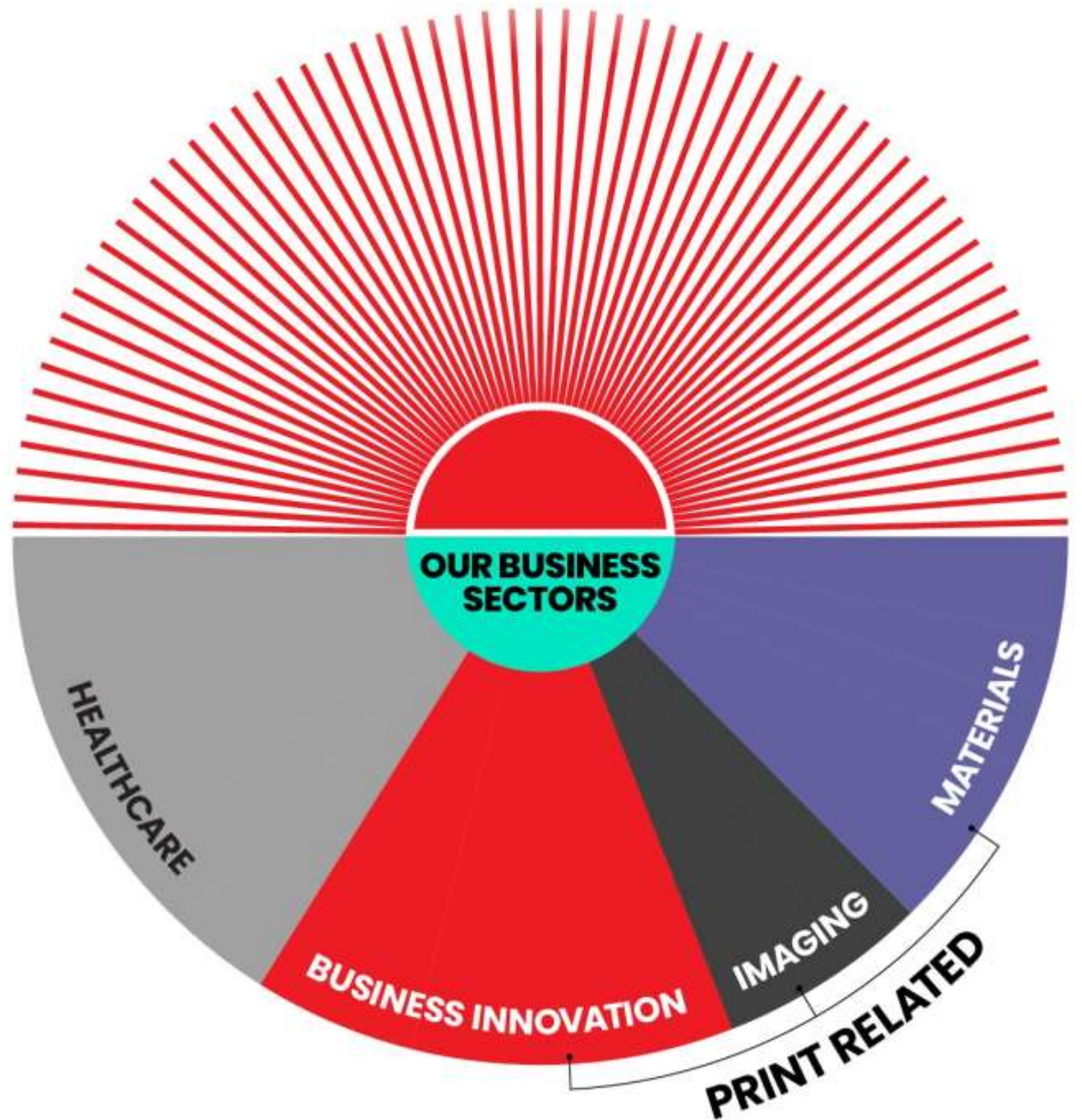


Label & Packaging

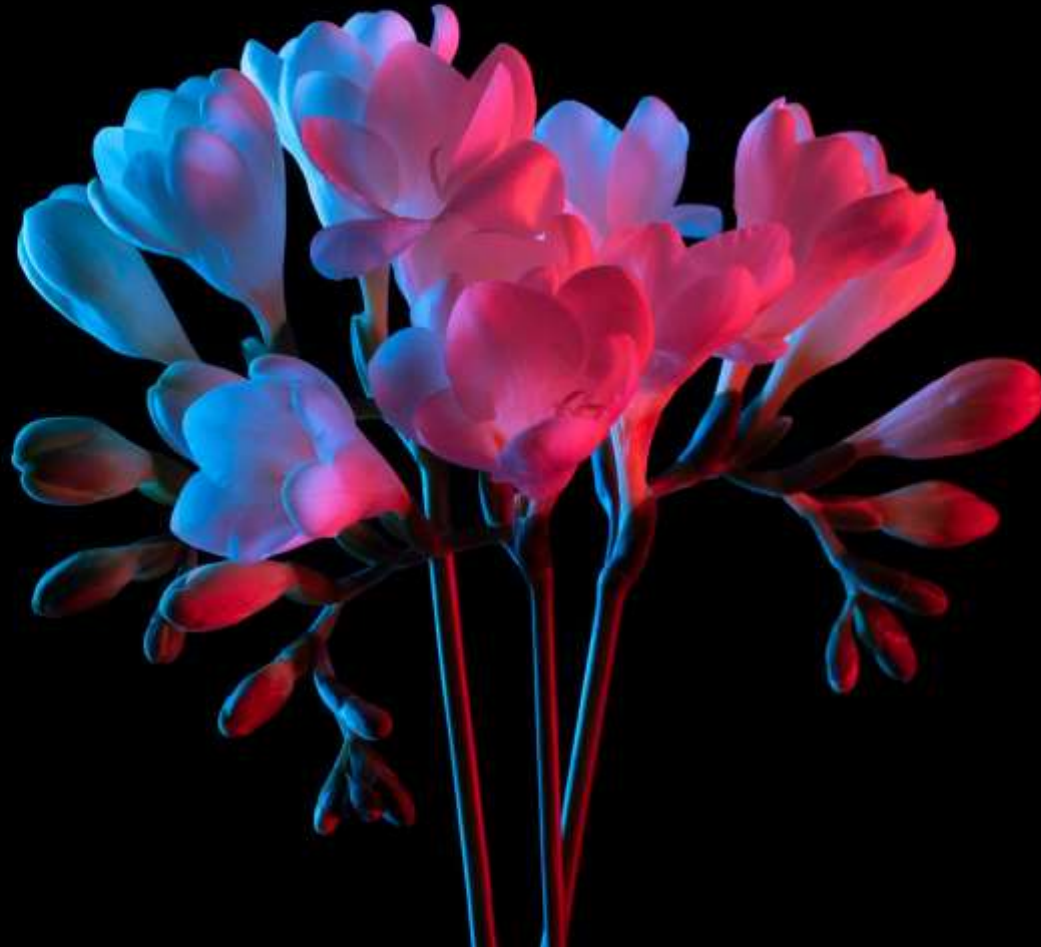


Wide Format

**40% of
our global
business
relates to
print**



We value sustainability



Achieve net zero CO₂ emissions by 2040



An abstract, high-energy visual effect featuring a central black void from which a dense, chaotic burst of bright blue and cyan light rays emanates. The rays spread outwards in all directions, creating a starburst or explosion-like appearance against a solid black background. The text 'Realise your vision' is centered over the dark core of this burst.

Realise your vision

Digital rising.

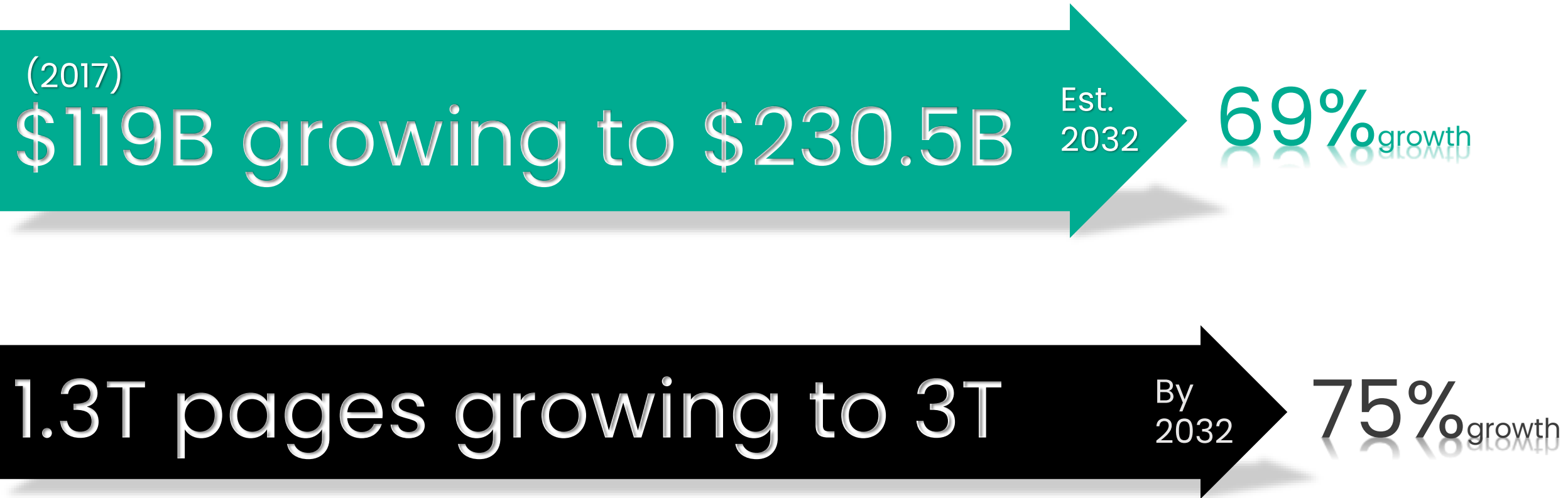
Printing is growing, technologies are adapting

Transformation is not the end of the old,
but the beginning of the new.



(\$ million, constant 2024 prices & exchange rates) Countries include: China, South Korea, Other Asian, Australasia, Source : Smithers, The Future of Digital Print 2032

The digital train has left the station.



(\$ million, constant 2023 prices & exchange rates) Countries include: China, South Korea, Other Asian, Australasia
Source : Smithers, The Future of Digital Print 2032

The digital consumer

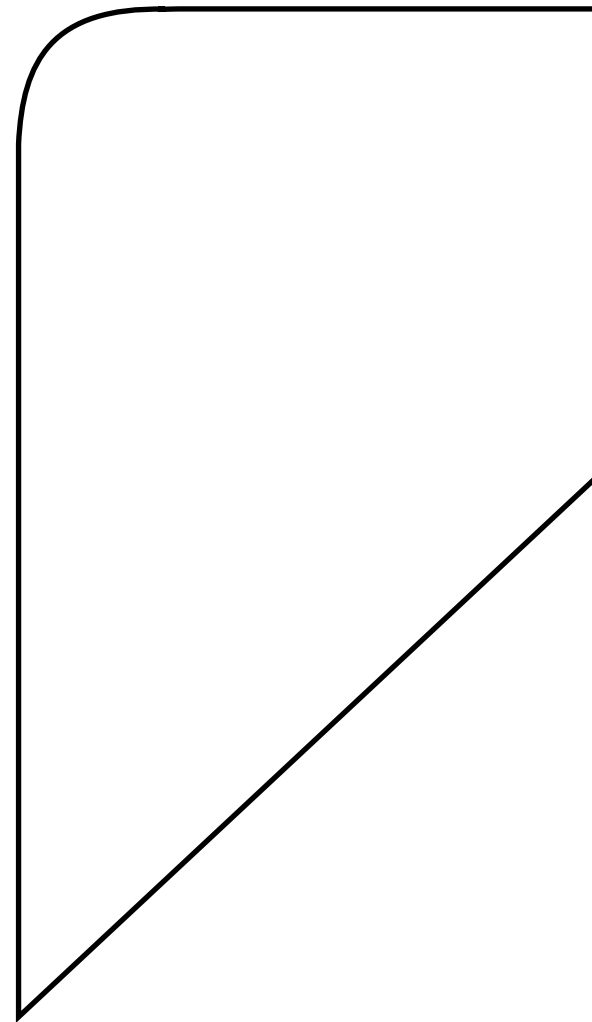
What in the world is happening?

A tipping point.

From which we seldom return.

Def.
(philosophy)

a threshold, critical mass, boiling point moment that leads to sudden, dramatic, radical change



8 drivers of digitization

Digitized methods of production transcend all applications. As brands drive demand, they are looking for innovations that drive connection to their audience.

1 Lifecycles have reduced significantly. >2 years in 1980, 6 months today. A 75% reduction.

2 Gen Z consumers. Trends undergo rapid change, shorter run SKU's growing no of jobs 47%

3 Anti-counterfeit. Trying to prevent \$12B in clothes, \$49B in Food and \$169B of Electronics fake goods

4 Connectivity. digital enables a personalised experience, online or offline

5 E-Commerce is around 20% of global retail sales, worth >\$5.2 Trillion Dollars, driving \$63.2 Billion in Digital Packaging

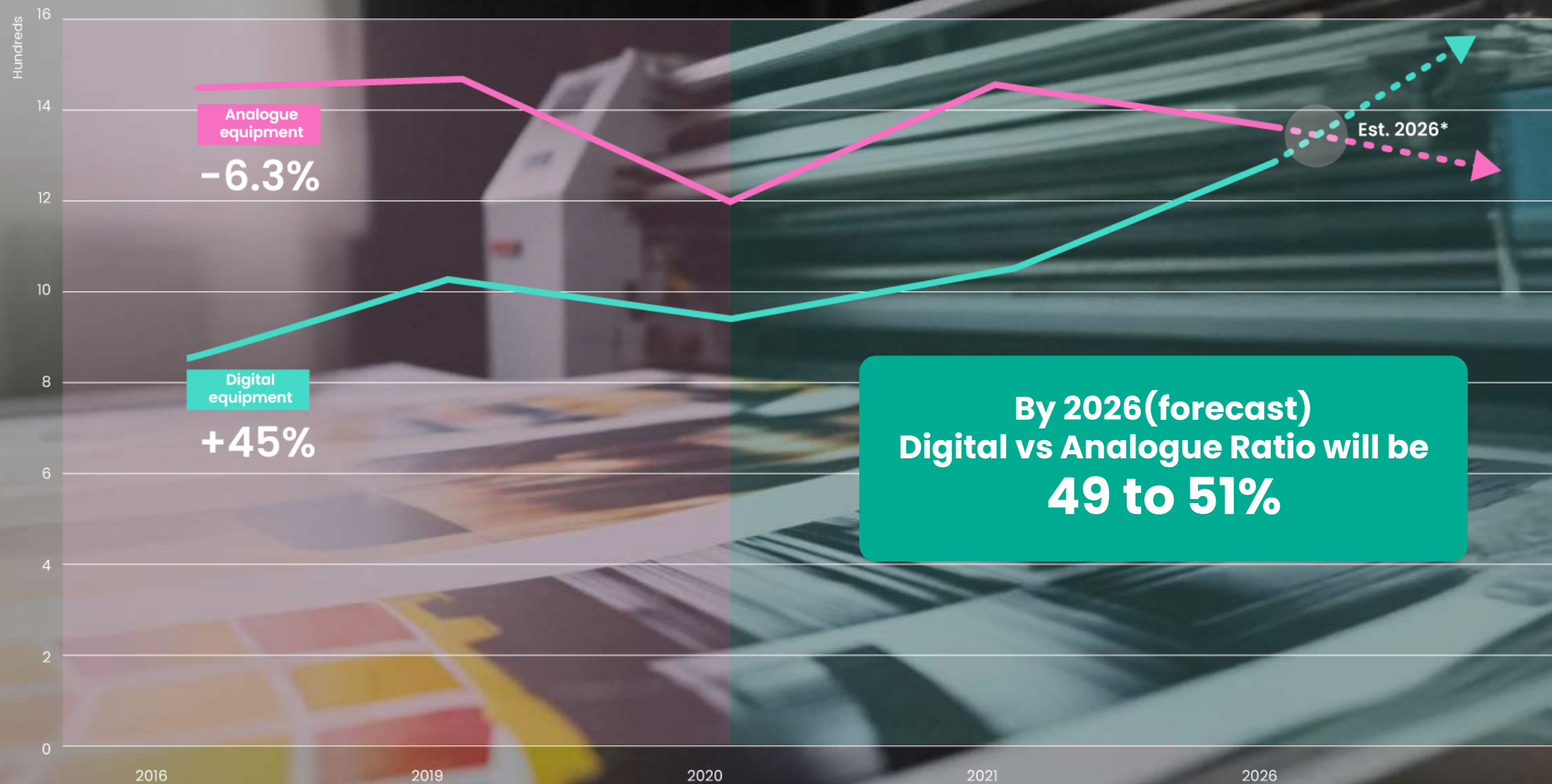
6 Smart & intelligent enabled by digital technology drives greater product integrity, lower TTM, higher Roi

7 Sustainability. Flexible Packaging packs 50% of food products in Europe but is only 6% of all consumer packaging materials.

8 Blockchain. allows packaging companies to capture the end-to-end process – without the need to login into individual systems

2016 – 2026 Overall Market Trend

CAGR for Total Equipment: 1.3%



E-commerce packaging & labels

1st Impressions count, really.

Bespoke, personal, quality

In 7 seconds, we make up our mind on the brand, based on the packaging.

52% of shoppers who receive custom packaging aim to return to the brand.

Intentional packaging has shown to drive a 30% increase in customer engagement.



Product Integrity and Anti-Fraud

Stopping revenue loss

Serialized Packaging

Pharma serialization is the process of assigning unique serial numbers to every drug packaging that is sellable; primary, secondary, and tertiary.

From blisters to bottles, cartons, and pallets, they all carry a unique identifier.
This unique identifier.



QR Codes and the end of the menu

(I like printed menus)

Versioned Packaging

The rise of Limited Edition products is a way of creating greater market value for brands.

In tandem, and not restricted to limited editions the rise of QR Code use, enables maximum customer engagement. Digitally printing is the preferred way.



Time to be personal

The brand connection point



"Digital printing is a new technology, but for clients, designers and creators who can see its potential, the size of the prize is **unprecedented**".

Katie Ewer, Strategy Director, JKR Global

Give yourself a Diet Coke break.

Over 150 names to find
at your nearest store.

love what you love®



GB, 18+, 15.7-9.9, Entry via Coke App, See coke.co.uk/app/byyou or App for T&Cs.
©2024 The Coca-Cola Company.



Get the App

Time to engage

Tapping into a brand strengths

If you're the owner of a big brand, you're obliged to make big bets with any packaging change.

Big bets, therefore, tend to be safe bets. Big bets make for risk-averse clients and boring, safe creative design and production.

Digital print is more cost effective for short runs, so it allows you to experiment, test, trial, adapt, test again and perfect a design idea.



Run for 5 years: "The initiative encourages consumers to purchase a personalised can of 'Get Well Soup' via the Heinz Soup Facebook page. For each purchase, Heinz donates £1 to support activities for hospitalised children later in the year."

Mario Marioni, Heinz

Time to be pioneering

The noise from within the crowd



WildlifeDirect partnered with Amarula to protect Africa's elephants. With less than 400,000 African elephants left, and one lost every 15 minutes of every day to ivory poaching, experts indicate that this majestic species will be extinct by 2030! To protect Africa's heritage and further entrench their commitment to conservation, Amarula has joined forces with Kenyan-based conservation organisation WildlifeDirect.

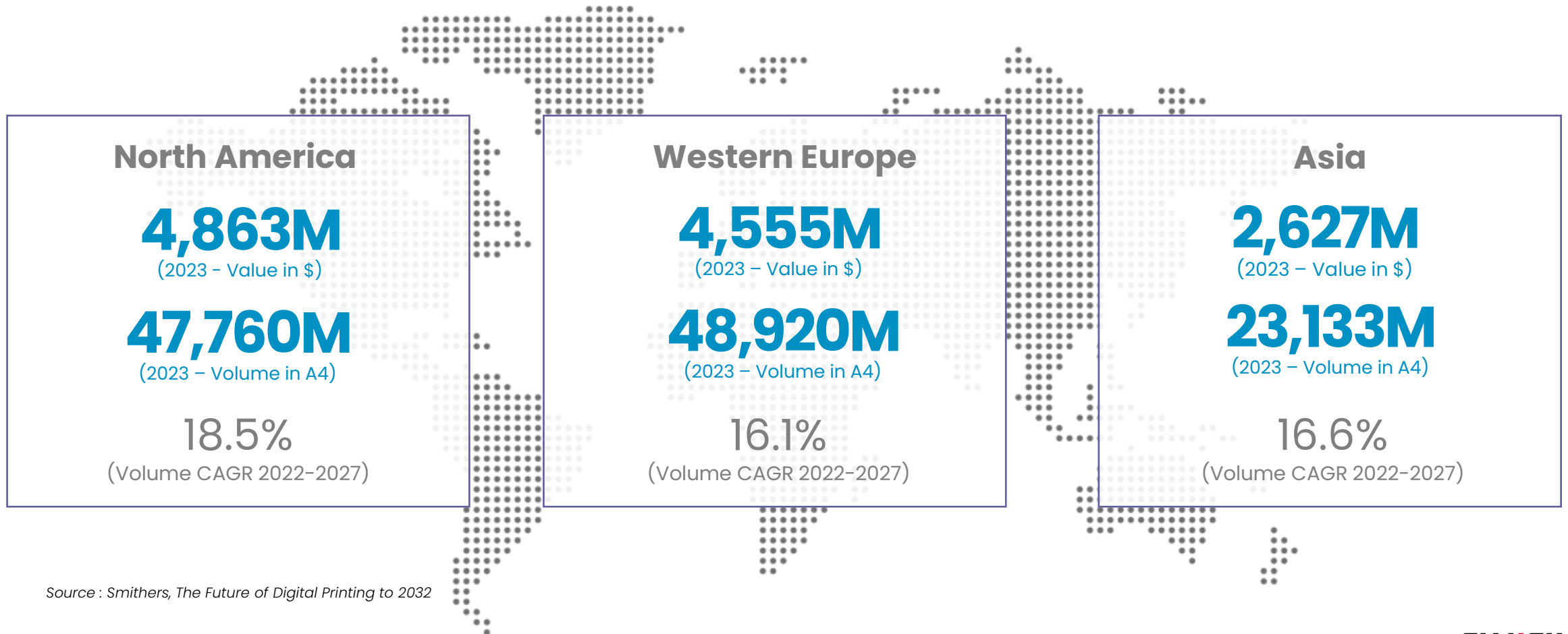
400,000 African elephants were given a name by Amarula customers. They created a uniquely designed 1 of 1 bottle, with the customers design And the elephant's name. \$1 from each bottle going to support Wildlife Directs efforts.

Name Them, Save Them Campaign. Amarula

New opportunities

Where is the added value in packaging production?

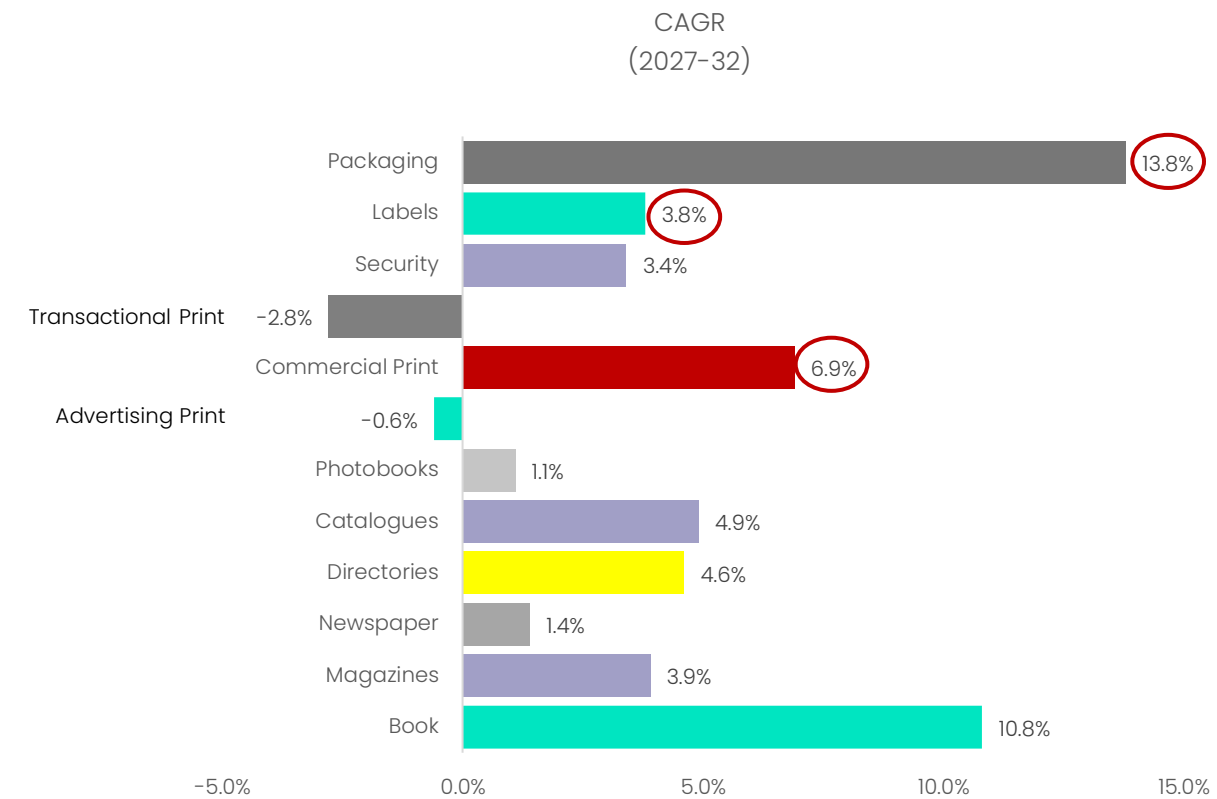
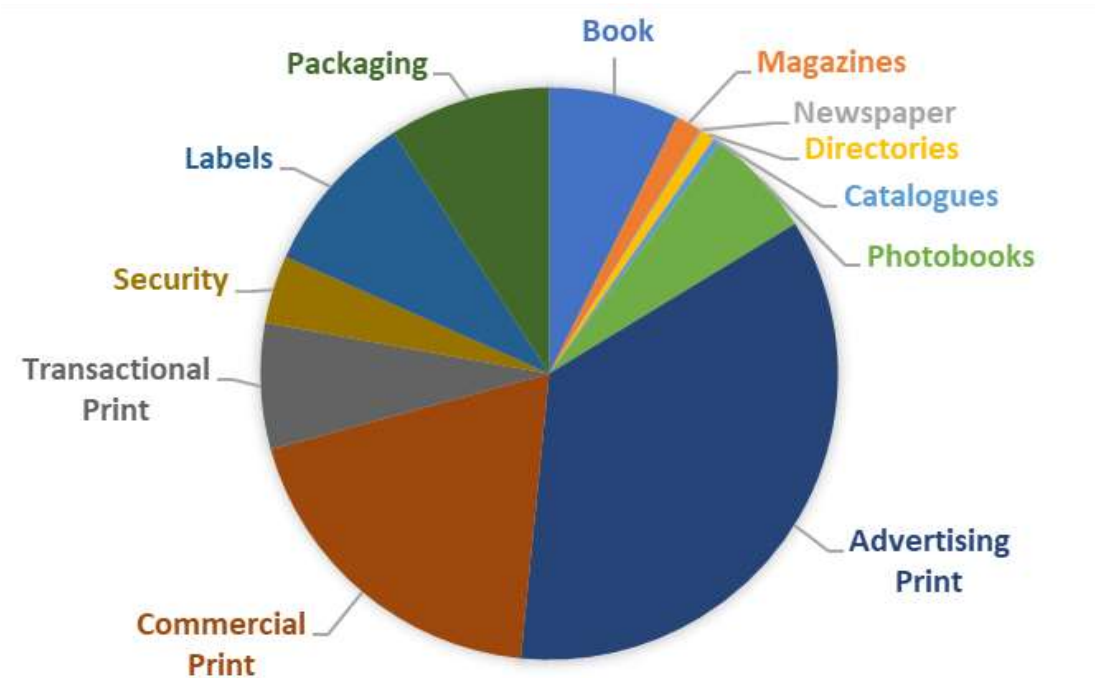
Global Packaging Printing Output by Geographic Market



Source : Smithers, The Future of Digital Printing to 2032

Global Digital Printing Output by print product

CONTRIBUTION

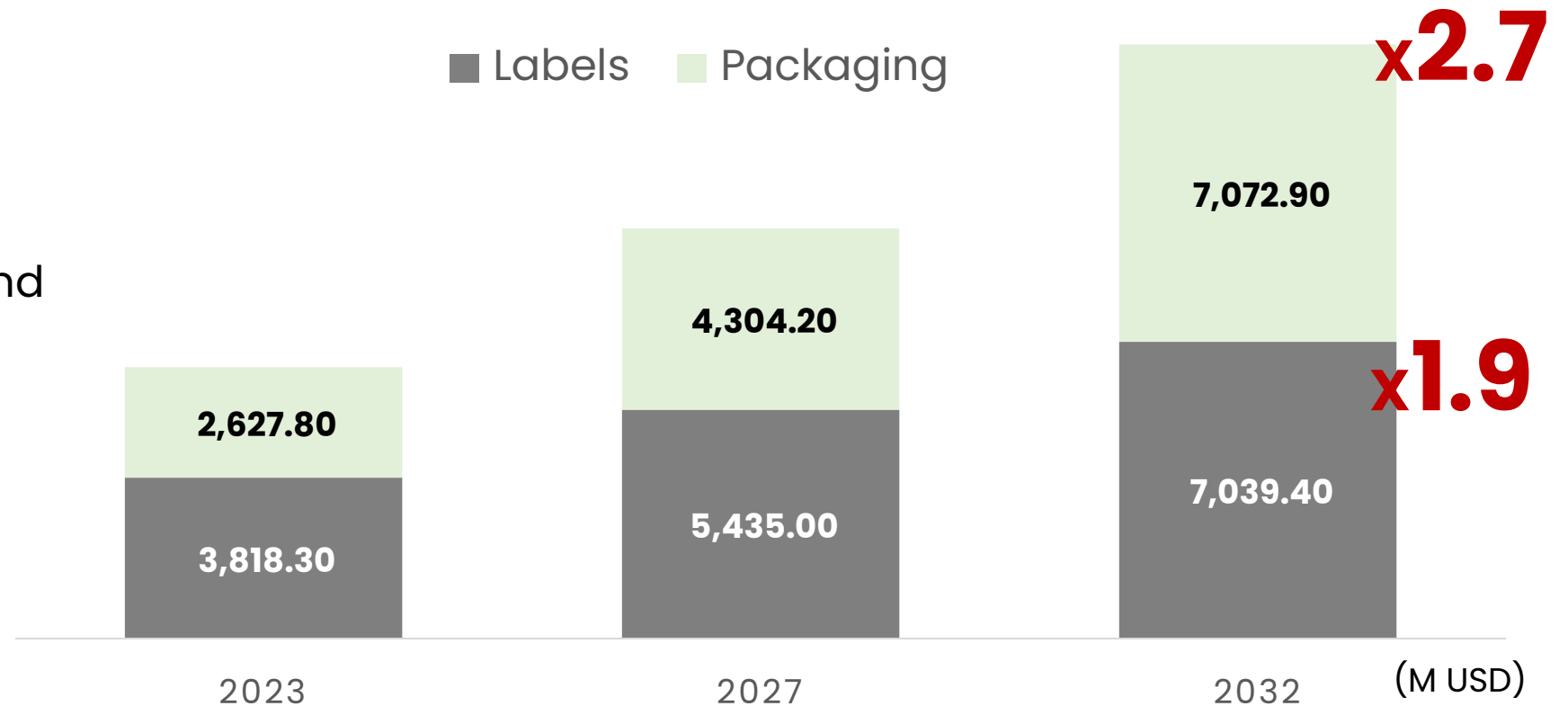


Source : Smithers, The Future of Digital Printing to 2032

Asia Labels & Packaging Digital Printing Output

Market almost doubling and tripling in a decade

- Packaging CAGR from 2022 to 2027 at 13.6%
2027 to 2032 at 10.4%.
- Labels CAGR from 2022 to 2027 at 9.1%
2027 to 2032 at 5.3%.



Source : Smithers, The Future of Digital Printing to 2032



disruptive technologies

inkjet

toner

A man in a black shirt is standing in a dark industrial setting, interacting with a large, dark-colored Fujifilm Jet Press 750S inkjet carton printer. The machine has a prominent 'FUJIFILM' logo on its side. The man is pointing at a touchscreen control panel on the right side of the machine. The background shows various industrial components and lighting fixtures.

Jet Press 750S

Inkjet cartons & print



Jet Press FP790

Inkjet flexible packaging

The Jet Press FP790 at a glance

- 50M per Minute
- Higher colour density than flexo
- Text quality: 3pt type
- No pinhole after 300+ twist & crash
- Bond strength: 3.4N/inch (OPP/OPP)

WATER-BASED PRIMING

Treatment process to ensure ink adhesion for different substrates

UNWINDER

INLINE CORONA

Creates surface tension of the substrate for better wettability, adhesion and print quality

DIGITAL PRINT UNIT (CMYK) & DRYING

High resolution

New 1200 X 1200 dpi printing heads enable highest quality printing .
Ability to do heavy coverage and small type

Vibrant colour

Color density is much higher than existing flexo and digital. Able to hit 90.5% of Pantone gamut with CMYK

AUTOMATIC REGISTER

Controlled within +/- 0.15mm

REWINDER

DIGITAL PRINT UNIT (WW) & DRYING

High opacity digital white

Two digital white inkjet channels hitting 55-58% opacity.

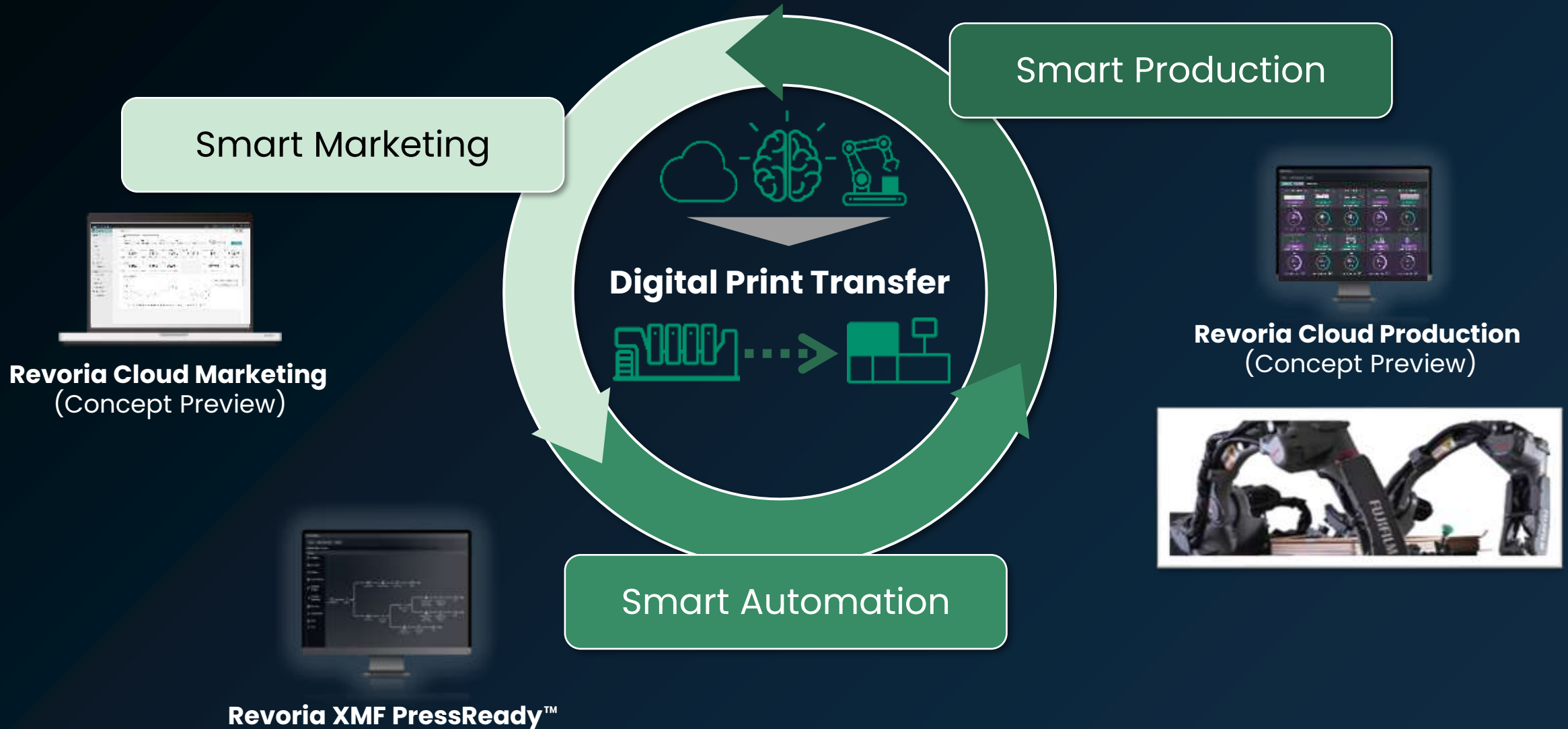
IMAGE INSPECTION

Inspection technology in order to ensure print quality, capture defects & reduce waste

Disruptive services.
Change the game.



FUJIFILM Smart Flow



Print Production Optimisation Advisory

Understanding your business and how Fujifilm can help to drive your success

How FUJIFILM's Print Production Optimisation Can Help



Partner with
FUJIFILM team to
uncover gaps and
white spaces in
your operation.
Getting started is
as simple as **steps**
1, 2 and 3.

STEP
01



Business Visualisation

Using your real, actual production data, this step provides valuable insights into how your overall print production processes impact productivity.

STEP
02



Data Analysis

A thorough analysis of your production data and a simulation of how using both offset and digital printing could affect total lead time and cost.

STEP
03



Optimisation Proposal

Finally, a summary of recommendations that will enhance efficiency and productivity, delivering measurable benefits to your overall business performance.

For FUJIFILM Business
Innovation Asia Pacific

COLOUR MASTERY

24 Dec 2004

Made Possible With Colour Innovation Program

FUJIFILM
Value from Innovation



How FUJIFILM's Colour Innovation Program can help



Colour Workflow
Consultation services



Customised Education
and Training



Industry Colour
Standard Certification
Services

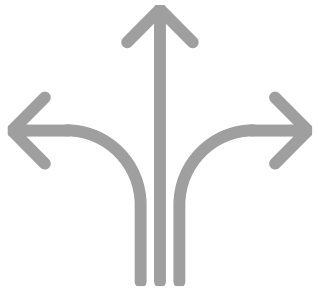


Tailored Colour
Management Services

Tailored Colour
Management
services that
enable digital and
analogue accuracy.

Keep branding
requirements with
outstanding
predictability and
repeatability across
different presses
and devices in your
print environment.

One Solution Provider.



Flexible



Intelligent



Efficient



Reliable

