



## Asian Gravure Market

The strength of gravure printing  
in Asia

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## Unique Selling Proposition of Gravure Printing

- Application of versatile substrates
- Economical for long run prints
- Brilliant colors
- Higher ink Density
- Excellent consistent image



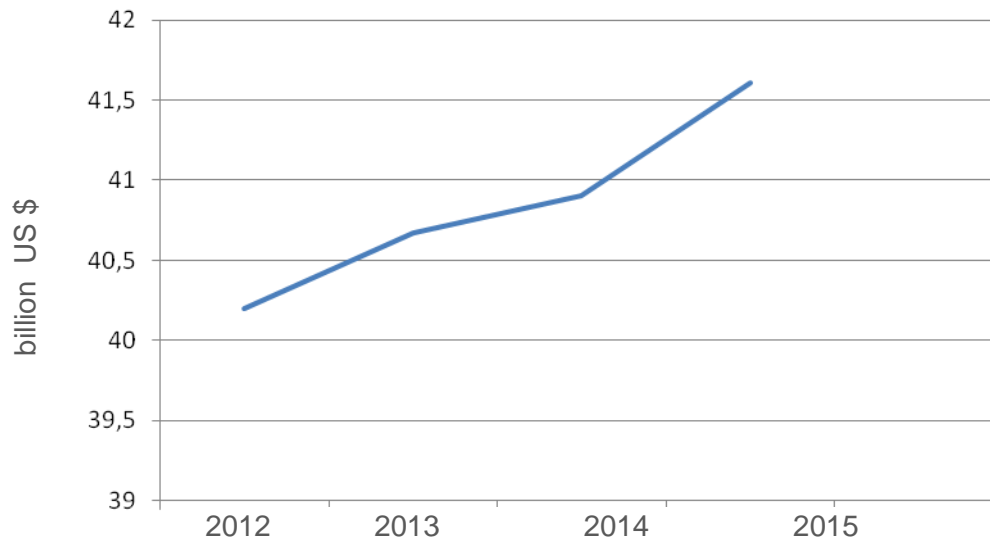
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## What is the future of global gravure packaging printing?

## Total global market growth for gravure packaging printing

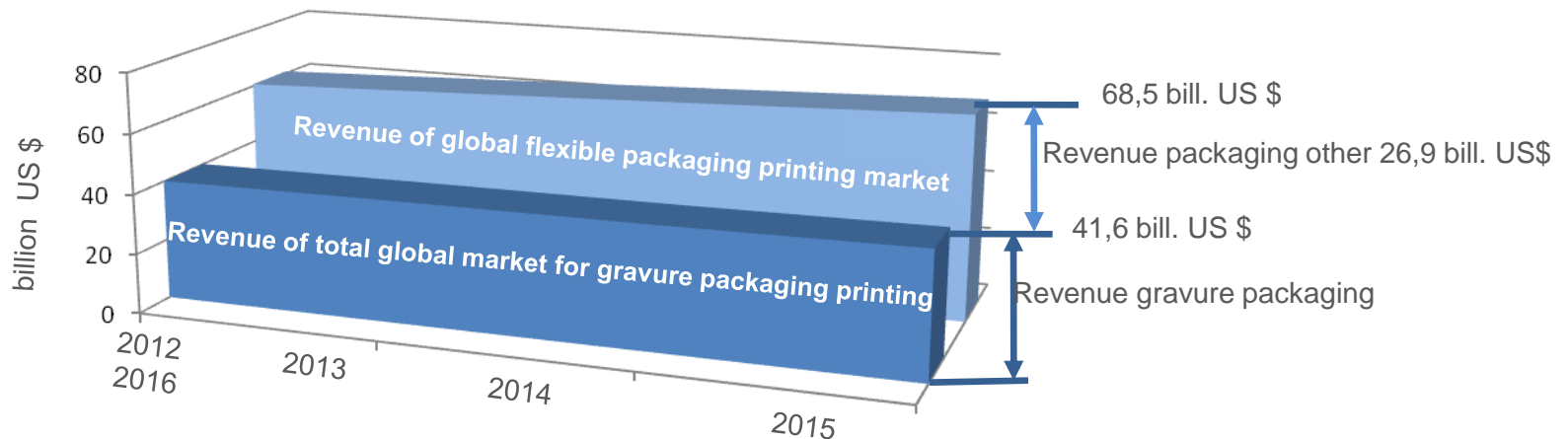


Source: Converting Today → Pressing Engravement 2012

**Gravure packaging market grows up to 3.5 % from 2012 to 2015**

## Booming global flexible packaging market

### Smooth growth for gravure packaging printing



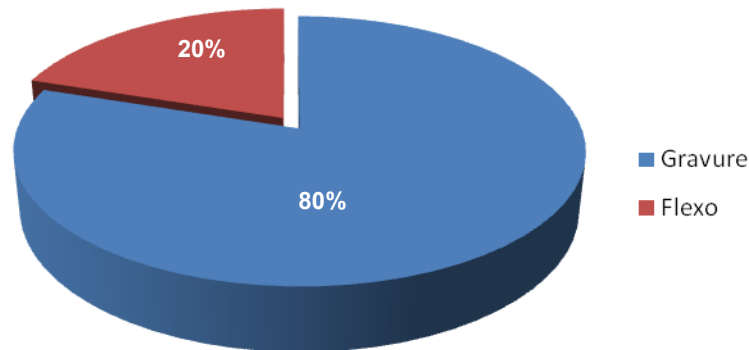
Source: Converting today 2012

### Positive revenue outlook for gravure packaging printing

## Asian market position of gravure printing



## Asian Flexible Packaging Market classified according to the used technology



Source: European Rotogravure Association

**Gravure is dominating the Asian flexible packaging market**



## The core business of gravure in ASIA

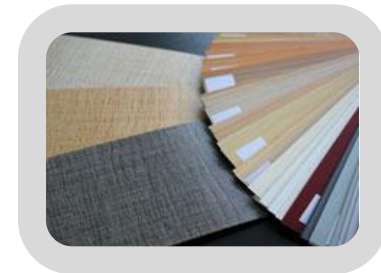
- Tobacco Package Printing



- Flexible Packaging



- Decorative Packaging





## Why gravure dominates the Asian market?

- Labor costs operators earn as little as \$7-10 a day
- Machine investment (low cost press with 8 colors available for 250 K \$)
- Consumables: Ink, substrates, impression rollers , doctor blades, etc.
- Gravure is the primary knowledge base for the suppliers in this market
- Gravure cylinder cost economics of volume and infrastructure
- Temperature majority of plants are not climate controlled
- Historically the gravure printing process was more present in the past

than the flexo printing

## Largest packaging markets are China and India?

- India: 5000 gravure printing factories
- China: 8000 gravure printing factories
- Classification: A → global operating companies using European and North American equipment (Positive Packaging Group, Uflex, Huhtamaki Paper Products, ITC, Packaging India, Parikh Packaging, etc. 5 to 8 machine per factory
- B → national operating companies; RGL Converters, Jupiter Laminators, SRI kuma Agencies, etc. equipped with 3 to 5 machine per factory
- C → regional operating companies equipped with 1 to 2 machine per factory using low cost gravure equipment

## Peculiarity company structure of Uflex Group

- Engineering division manufactures their own gravure presses, lamination- and slitting machines
- Printing division operates with European equipment; Cerutti, Rotomec, Schiavi gravure presses, recent press orders was for 9 gravure presses ( 2011 / 2012)
- Cylinder division manufactures their own gravure cylinders and also offers their solutions for the domestic markets



## Asian machine manufactures

- Baeiren, China > 150 presses per year
- Expert Industries, India > 40 presses per year
- Pelican Rotoflex, India > 40 presses per year
- SAM Sungan, South Korea > 35 presses per year
- Uflex, India > 30 presses per year
- Sotech, China > 35 presses per year
- Longnew, Taiwan > 30 presses per year
- KYMC, Taiwan > 25 presses per year
- Ohsung-Intermac > 15 Indonesia/S.Korea
- Plus 30 small other manufactures in Asia > Over 300 presses

## Publication gravure printing JUST started in India

The German leading publication gravure printer Burda has established the first publication gravure printing plant in India in cooperation with Hindustan Times.

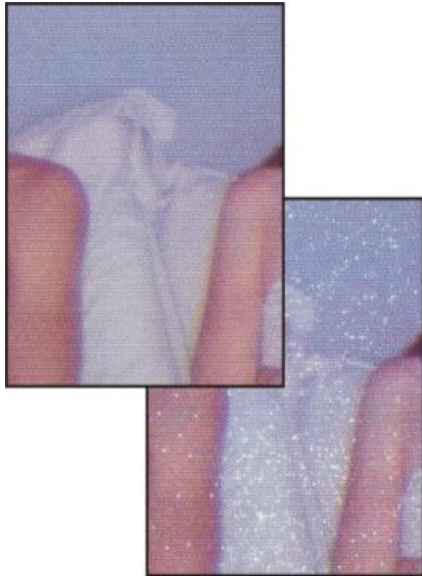
- Main Business is printing magazines, catalogues and school books
- Reel width can go up to 2.45m / Speed of 40.000 copies per hour
- Number of pages printed per form can be 96 pages per sheet (A4)
- Operation has started with two Cerutti 2.45m wide presses in March 2011



## The Tobacco gravure market in Asia

- Approx. 200 gravure printing plant
- Using European and local made gravure presses with inline rotary die-cutting
- High growing markets
- Plain cigarette packages are not an issue in Asia
- Health Warning Pictures are becoming the norm
- Printing Presses are now being expanded 7-10 decks

## High End Ancillary Equipment Demands



- **ESA**
- **Register**
- **Corona Treaters**
- **Vision Systems**
- **Web Guides**

Often basic presses are bought ancillary from Europe and USA are installed to achieve optimum print quality





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**Thank you for your attention**

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