FLEXIBLE PACKAGING

A DEEP DIVE

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COMPANY

DIGITAL PACKAGING PRODUCTION
WHAT ARE THE DRIVERS?

THE GLOBAL E-COMMERCE PACKAGING MARKET

PROJECTED TO DEVELOP AT A CAGR OF 15.87% PERCENT,
REACHING A TOTAL MARKET VALUE OF US$98.856 BILLION BY 2027

MORE SKUS, SHORTER RUNS, MORE INNOVATION
REDUCE, REUSE, RECYCLE

PACKAGING


white sugar
Cadbury Favourites
FOSTER CLARKS
CUSTARD
ORIGINAL RECIPE
Bushells
Blue LABEL
Gluten Free
Weet-Bix
Sanitarium
Rhodes
Fruit Cocktail
Fruit Salad
Christmas PUDDING
Edgell
Shortbread Fingers
Creamed Rice
Tim Tam
THIS WAY UP
CHICKEN

WHY FLEXIBLE PACKAGING?

- LOWER LIFECYCLE ENERGY CONSUMPTION OVER RIGID PACKAGING
- PRESERVES AND PROTECTS PRODUCTS
- EXTENDS SHELF LIFE
- CONVENIENCE
- SHELF APPEAL
- IN EUROPE FOOD PACKAGING
  - 10% OF ALL MATERIALS
  - 40% OF PRODUCT

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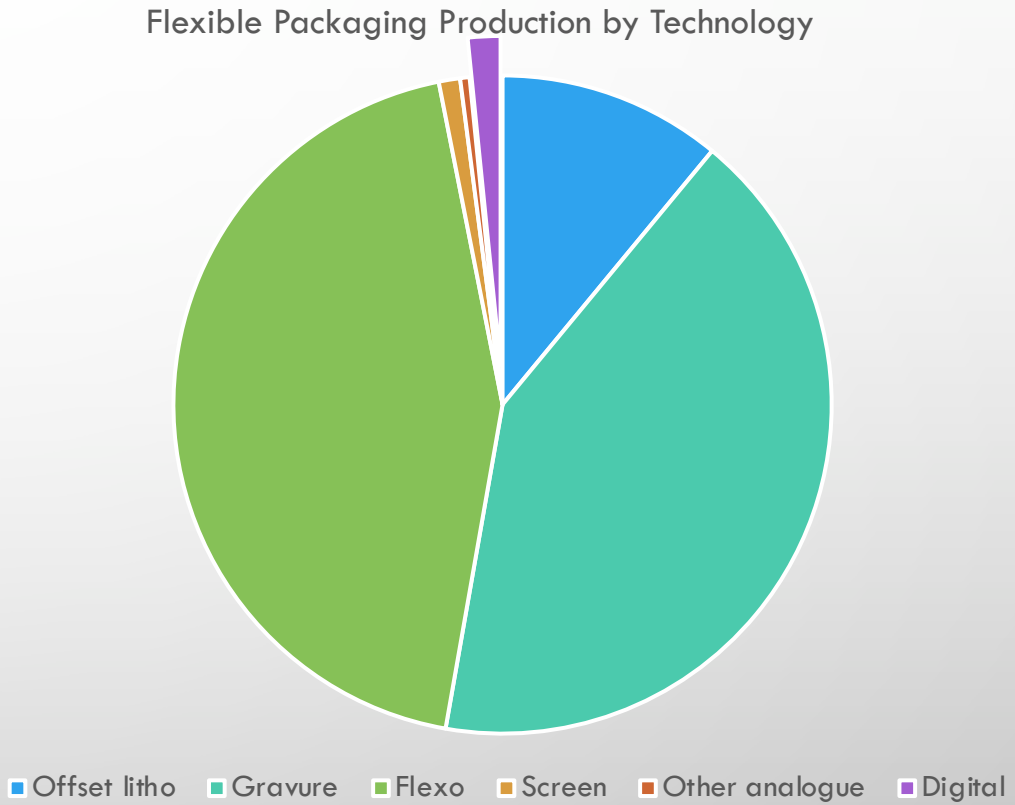
FLEXIBLE PACKAGING PROJECTED GLOBAL GROWTH 2022 – 2027

Includes: Bags, Sacks, Pouches, etc.

Growth Total 16.24%

Growth Digital 53.97%

Currently dominated by Gravure and Flexo



Source: Smithers

In constant 2020 prices and exchange rates

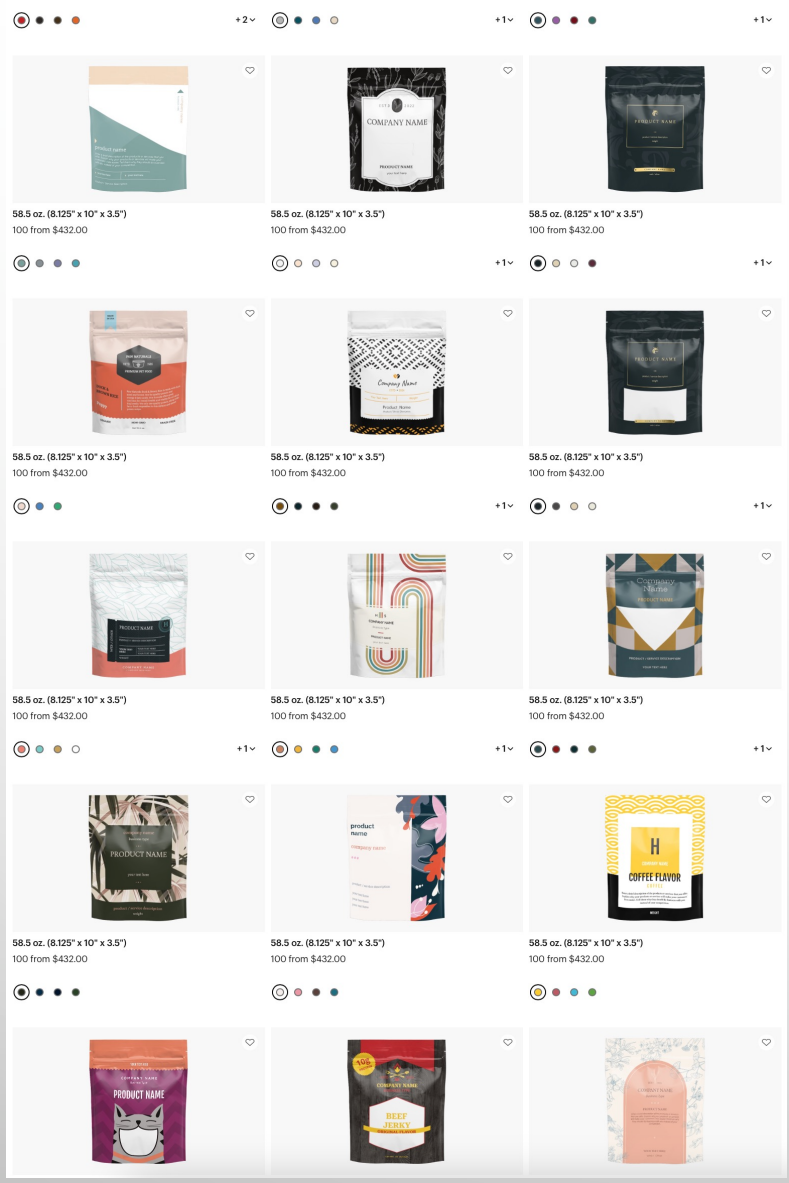
TOP FLEXIBLE PACKAGING PROVIDERS

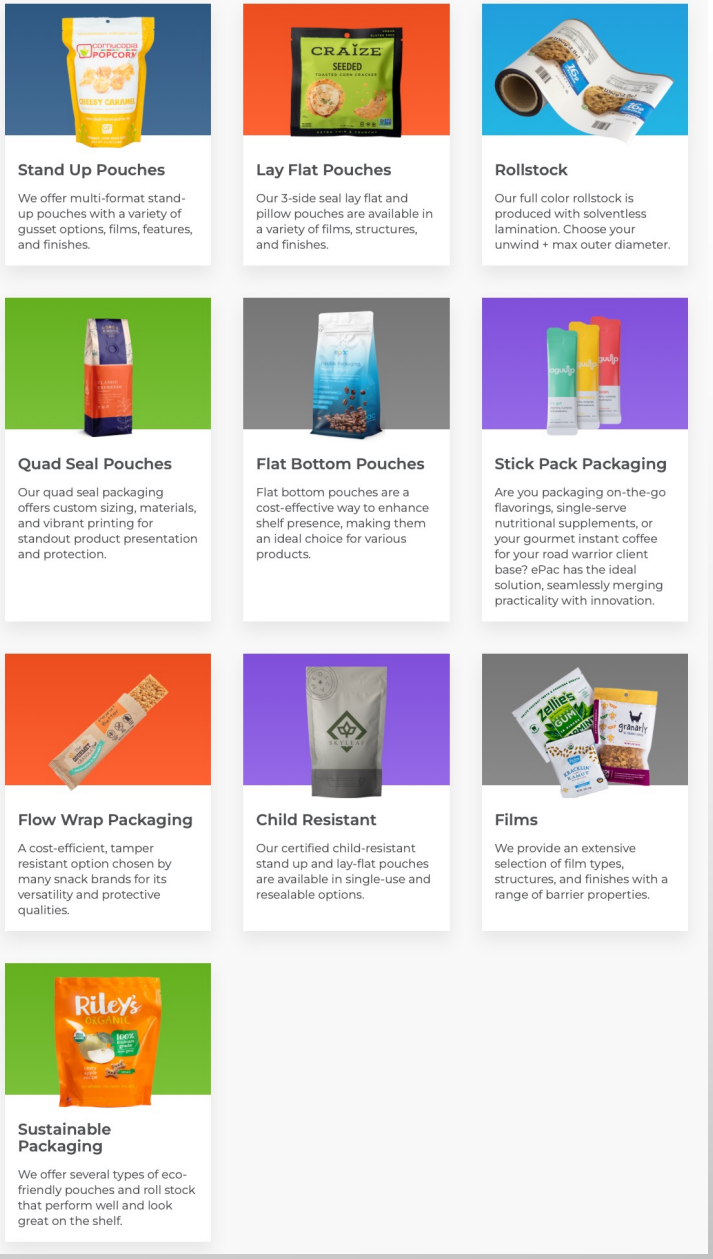
DIGITAL FLEXIBLE PACKAGING

- STARTED 2016
- OVER $200M ANNUAL REVENUE
- 600% GROWTH OVER LAST 3 YEARS
- 26 GLOBAL LOCATIONS WITH 36 PLANNED
- RECENT FUNDING ROUND – AMCOR

- NEW ENTRY – FAMILIAR BRAND

VARIETY OF DESIGNS





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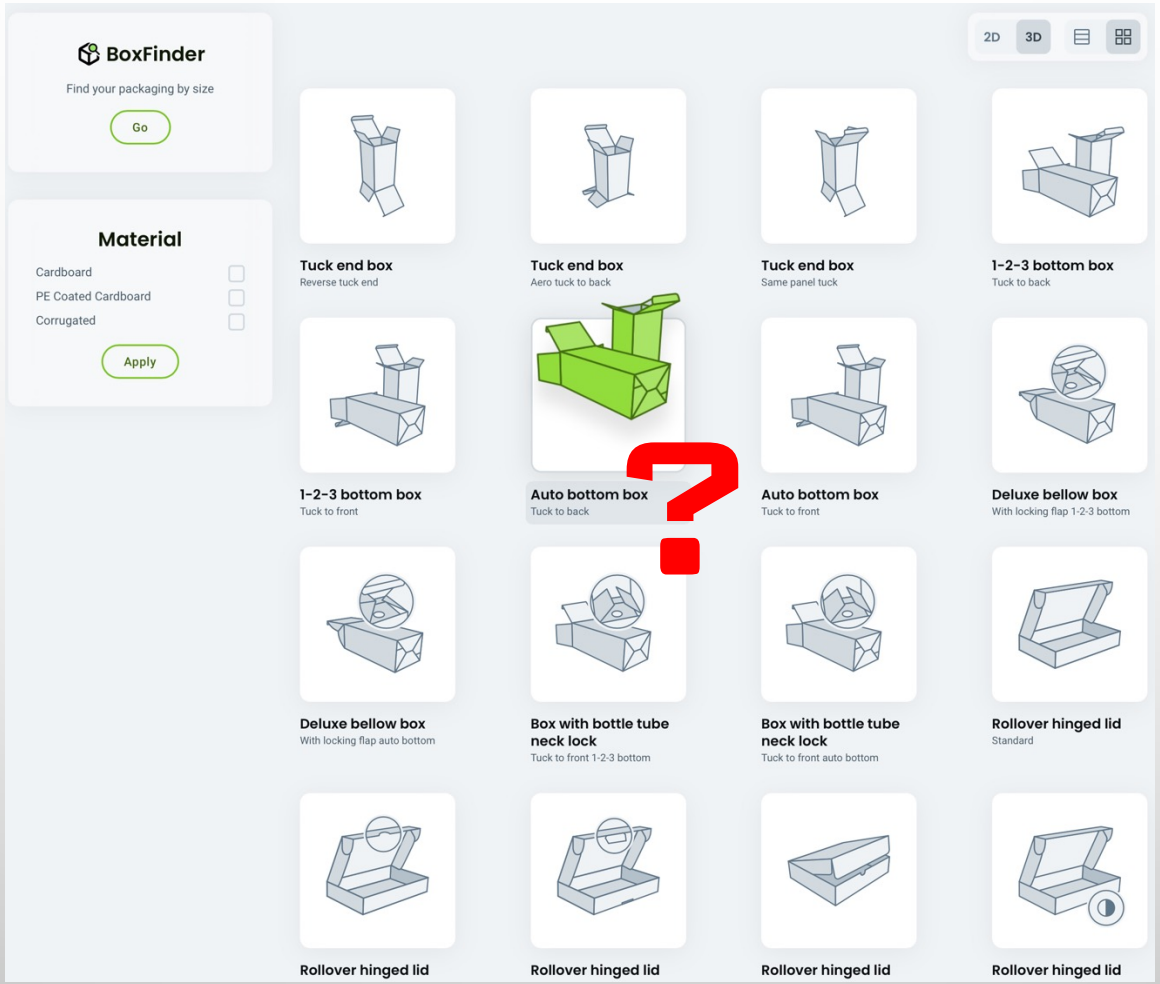
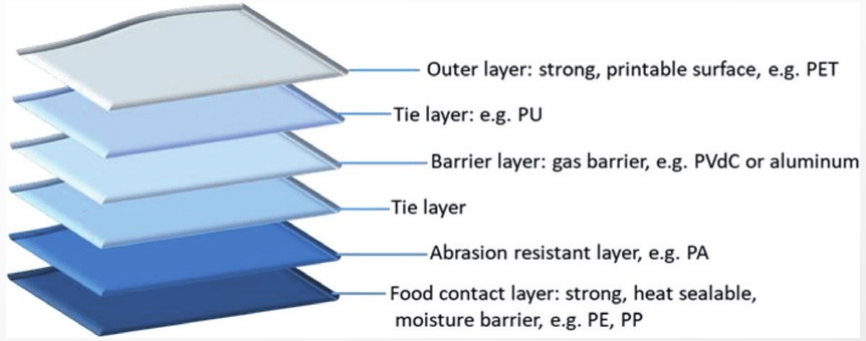
WEB 2 PACK

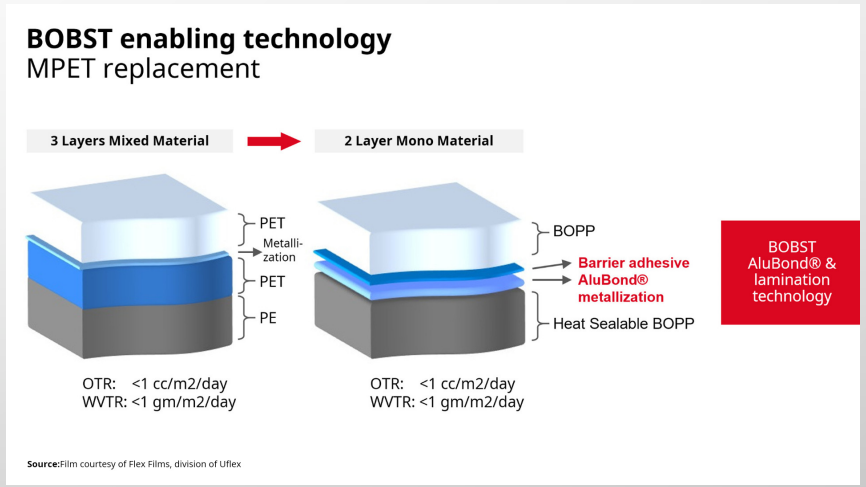

BoxFinder
Find your packaging by size
Go
Material
Cardboard
PE Coated Cardboard
Corrugated
Apply
2D
3D
Tuck end box
Reverse tuck end
Tuck end box
Aero tuck to back
Tuck end box
Same panel tuck
1-2-3 bottom box
Tuck to back
1-2-3 bottom box
Tuck to front
Auto bottom box
Tuck to back
Auto bottom box
Tuck to front
Deluxe bellow box
With locking flap 1-2-3 bottom
Deluxe bellow box
With locking flap auto bottom
Box with bottle tube neck lock
Tuck to front 1-2-3 bottom
Box with bottle tube neck lock
Tuck to front auto bottom
Rollover hinged lid
Standard
Rollover hinged lid
Rollover hinged lid
Rollover hinged lid
Rollover hinged lid

PRESS SIZES AND MATERIALS

- NARROW WEB ~13^{+}”
- MID WEB ~ 30^{+}”
- WIDE WEB ~ 40^{+}”

- PAPER
- PLASTIC(S)
- FILM(S)
- ALUMINUM FOIL
- MULTI-LAYER





Application Specific Drivers

PLASTIC VS. PAPER

- PLASTIC
  - MORE DURABLE
  - CAN BE RECYCLED…BUT
  - LESS RESOURCES TO MANUFACTURE
  - NOT ALL PLASTICS ALIKE
- PAPER
  - LESS DURABLE
  - ‘COULD’ GO IN REGULAR TRASH STREAM
  - HIGHER ENERGY COST TO MANUFACTURE
  - HIGHER CONSUMER ACCEPTANCE

Application Specific Drivers

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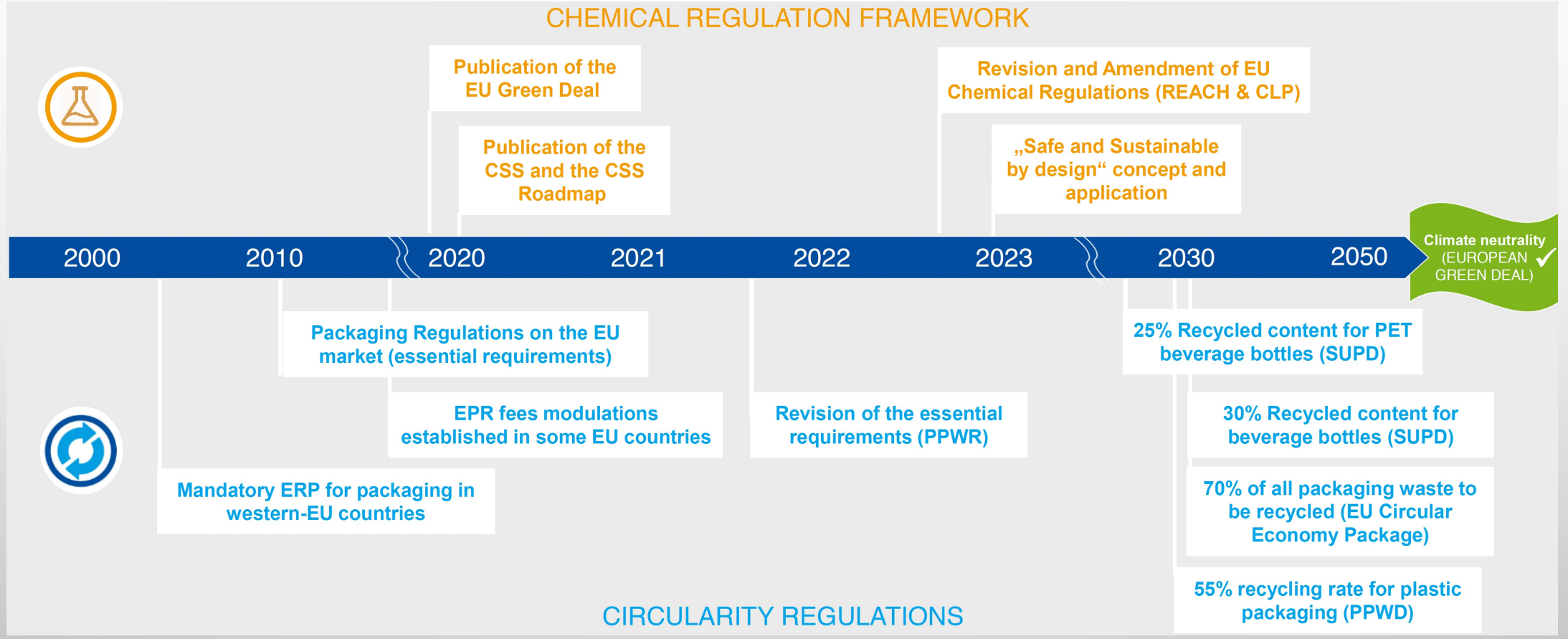
SUSTAINABILITY
IS MORE THAN JUST A GOOD IDEA



FLEXIBLE PACKAGING EP

© HP Indigo 25K

© HP Indigo 200K

© Xeikon CX500

FLEXIBLE PACKAGING INKJET – NARROW WEB

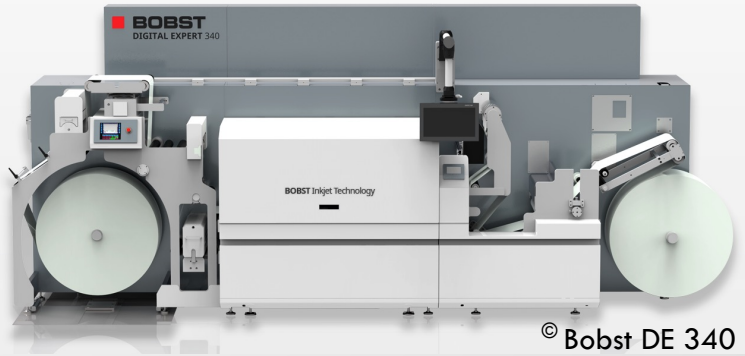
© Fujifilm Fujifilm LP 350

© Durst Tau RSCi

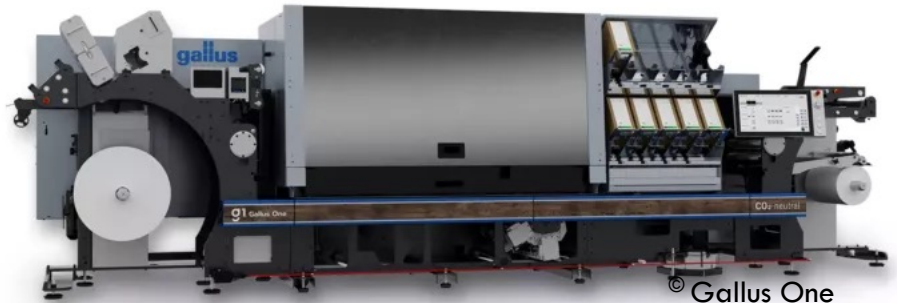
© Miyakoshi MJP 20W

© SCREEN Truepress Jet L350 SAI

© Epson SurePress L-4733AW



© Bobst DE 340



© Gallus One

© Domino N730i

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FLEXIBLE PACKAGING UV INKJET – MID WEB

© Miyakoshi MJP 30W

Hybrid Presses

- Bobst
- Gallus
- MPS
- Nilpeter
- Omet

AQUEOUS INKJET- MID WEB

© Miyakoshi MJP 30AXF

© Kodak Uteco Sapphire EVO

© Comexi Digiflex

© Fujifilm FP 790

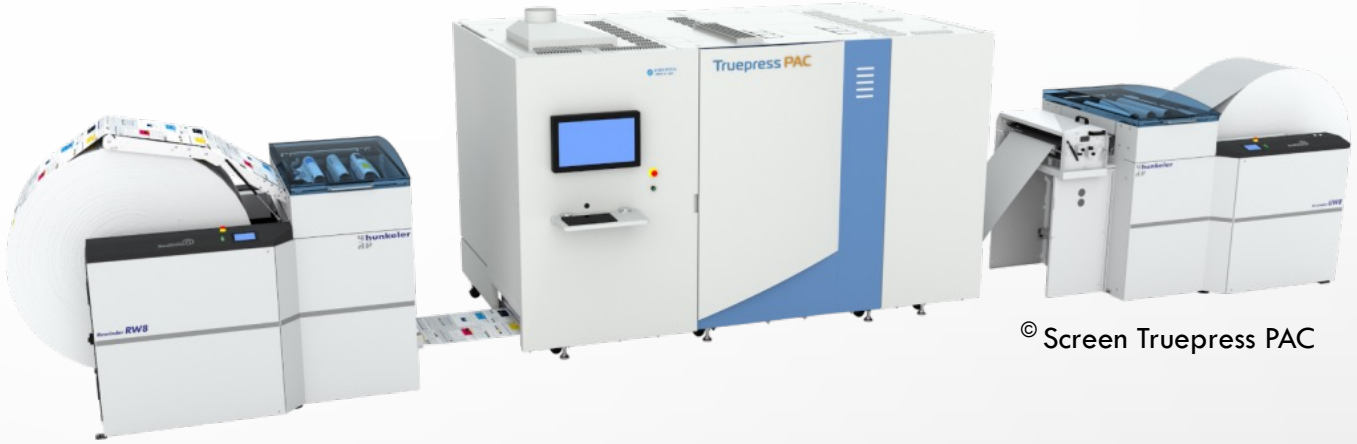
© Screen Pac Jet FL830

LANDA W10P AQUEOUS INKJET MID WEB

DRUPA ?

PAPER BASED

© Xeikon TITON



© Screen Truepress PAC

© HP 25K or 200K

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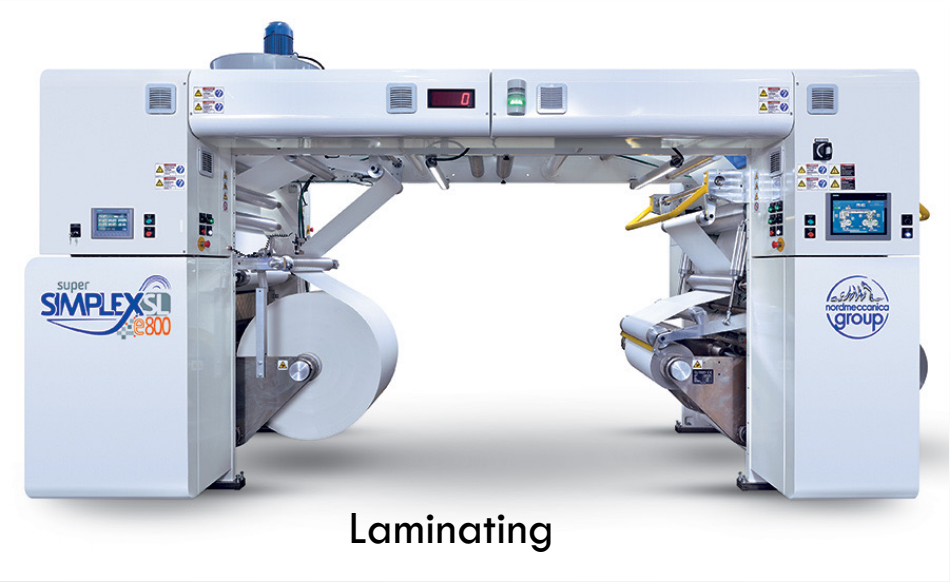
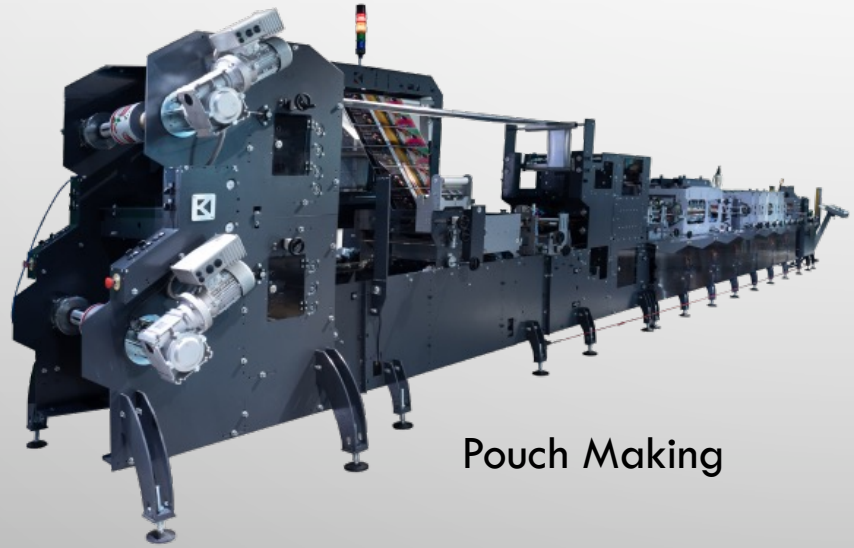
PRINTED – NOW WHAT?



Laminating

Slitter



Pouch Making

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A FEW TAKEAWAYS

- LABEL PRESSES CAN HELP YOU ENTER MARKET
- MID WEB OFFERS MORE OPTIONS
- EP HAS A TRACK RECORD
- INKJET ‘CAN’ BE MORE COST EFFECTIVE
- AQUEOUS OFFERS MORE OPTIONS FOR FOOD SAFE AND SUSTAINABILITY
- APPLICATION, APPLICATION, APPLICATION

THANKS!

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