

Asia Print Awards 2024 Jakarta
PT. HEIDELBERG Indonesia
Niklas Kumpf

UNFOLD
YOUR
POTENTIAL

HEIDELBERG - Who we are?

Market segments and key points.



World's largest manufacturer of sheetfed offset printing presses

Folding Carton



Label



Commercial



E-mobility



~ € 2,4 Mrd.

Net Sales
(FY23/24)



~ 9.800

employees

174Y

Reliable and highly innovative partner for more than 174 years



Global reach Sales & service network at 250 locations in 170 countries

PT. HEIDELBERG Indonesia

The experienced and the young combined for the success of our partners



- Local team of 86 colleagues
- Office & warehouse JKT & SBY
- **55 years** anniversary in 2024

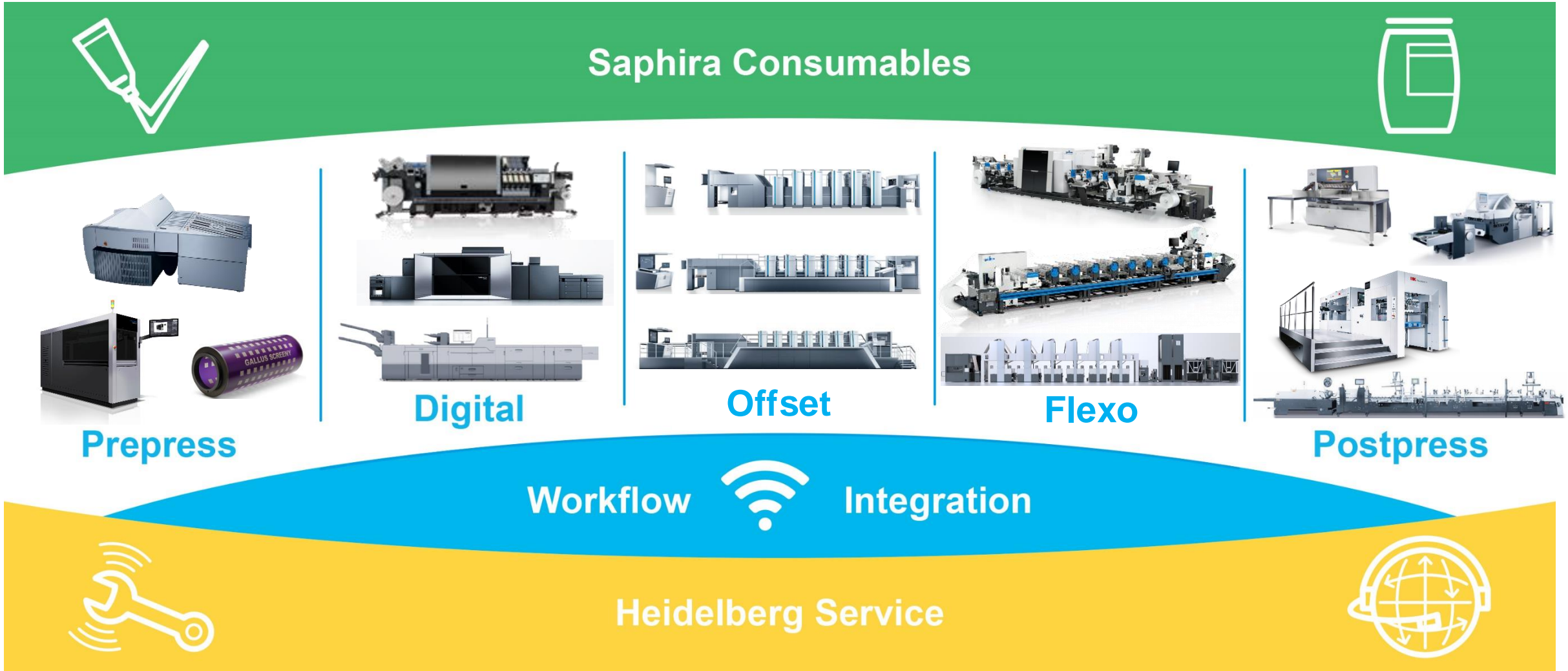
We can see a change in the industry....

From a **small**
craft
business...

The industry is changing
Our customers focus on
productivity & integrated solutions

...to industrial
print shops

HEIDELBERG covers the entire value chain End-to-end solution provider in the Packaging and Print segment

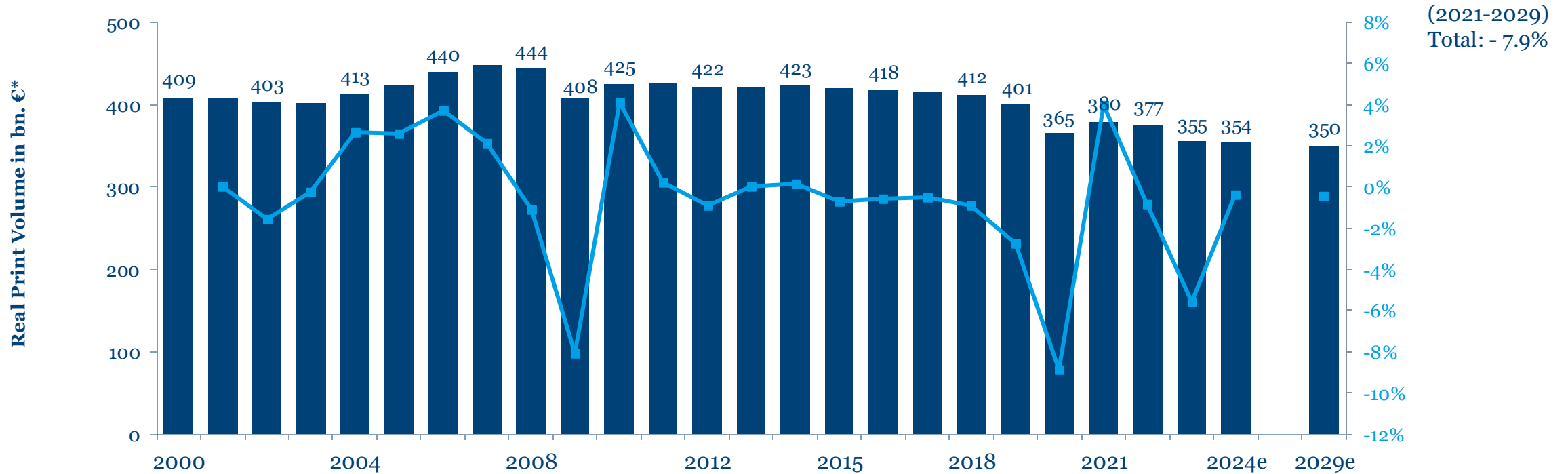


Development of the global Print Market



The Print Production Volume was significantly impacted by COVID-19 and most likely will not reach pre-Covid level again

Global PPV, in Billion €
Actual 2000-2023; Forecast 2024-2029



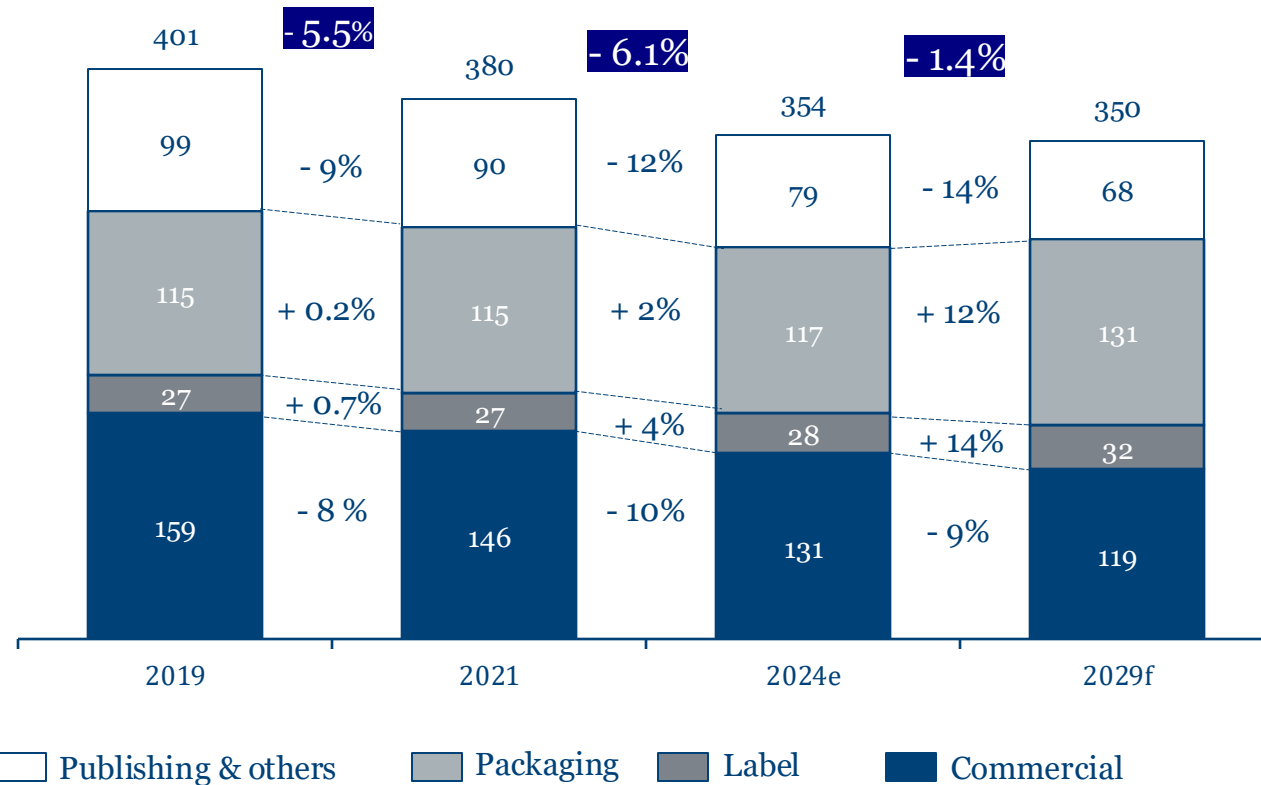
Development
 (2024-2029)
 Total: - 1.4%

(2021-2029)
 Total: - 7.9%

Source: Heidelberg estimate – October 2024, industry statistics, PIRA, RISI, S&P IHS Markit Global Insight
 Digital: Only Digital Production Devices are taken into consideration ----- *Base Year 2009

Publishing markets most affected by COVID-19, followed by Commercial Packaging & Labels hold up best with strongest growth up to 2029

Development of the global Print Production Volume by segments (PPV in €bn, development in %)



Packaging

- Folding Carton
- Flexible Packaging



Label

- Labels & Tags



Commercial

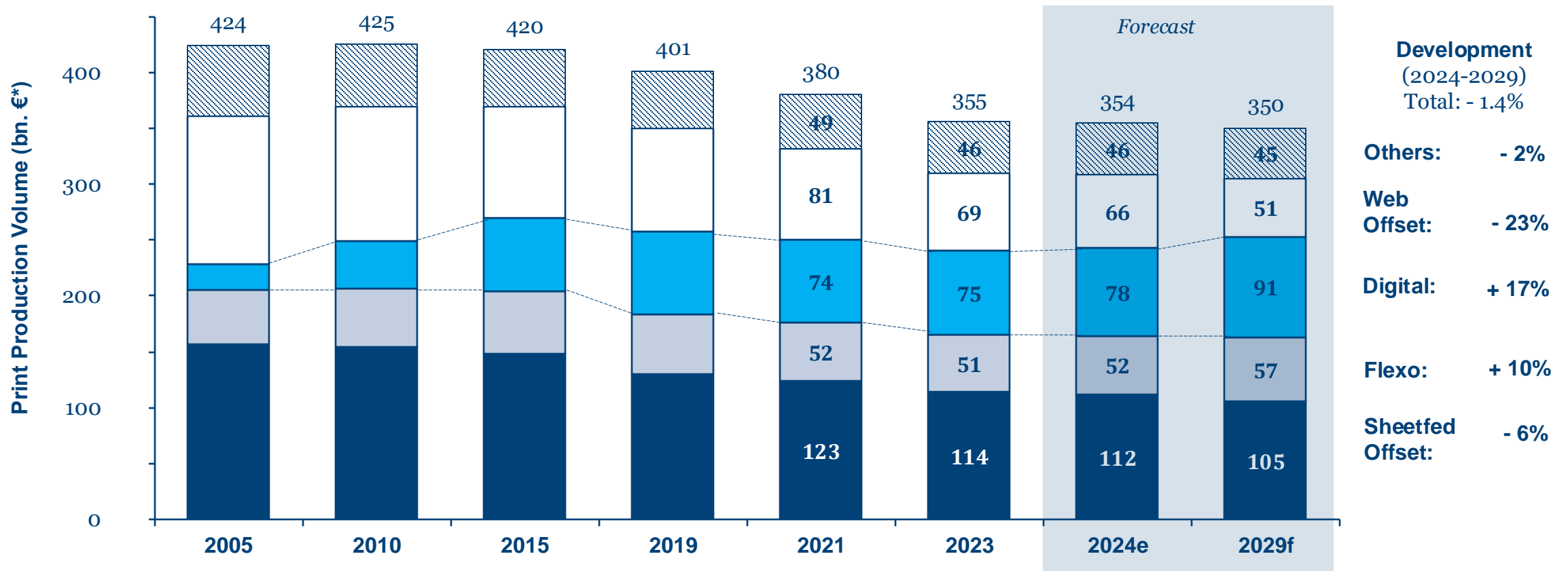
- Catalogs
- Advertising
- Financial / Legal
- Directories
- Business Forms
- Converted
- General Commercial

Source: Heidelberg estimate – October 2023, industry statistics, PIRA, RISI, S&P IHS Markit Global Insight
 Digital: Only Digital Production Devices are taken into consideration ----- *Base Year 2009
 Note: Numbers might not add up due to rounding

Printing industry market development. PPV Worldwide by technology.

Development of Printing Process Shares by Print Production Volume Worldwide (bn. €*)

Actual 2000-2023; Forecast 2024-2029



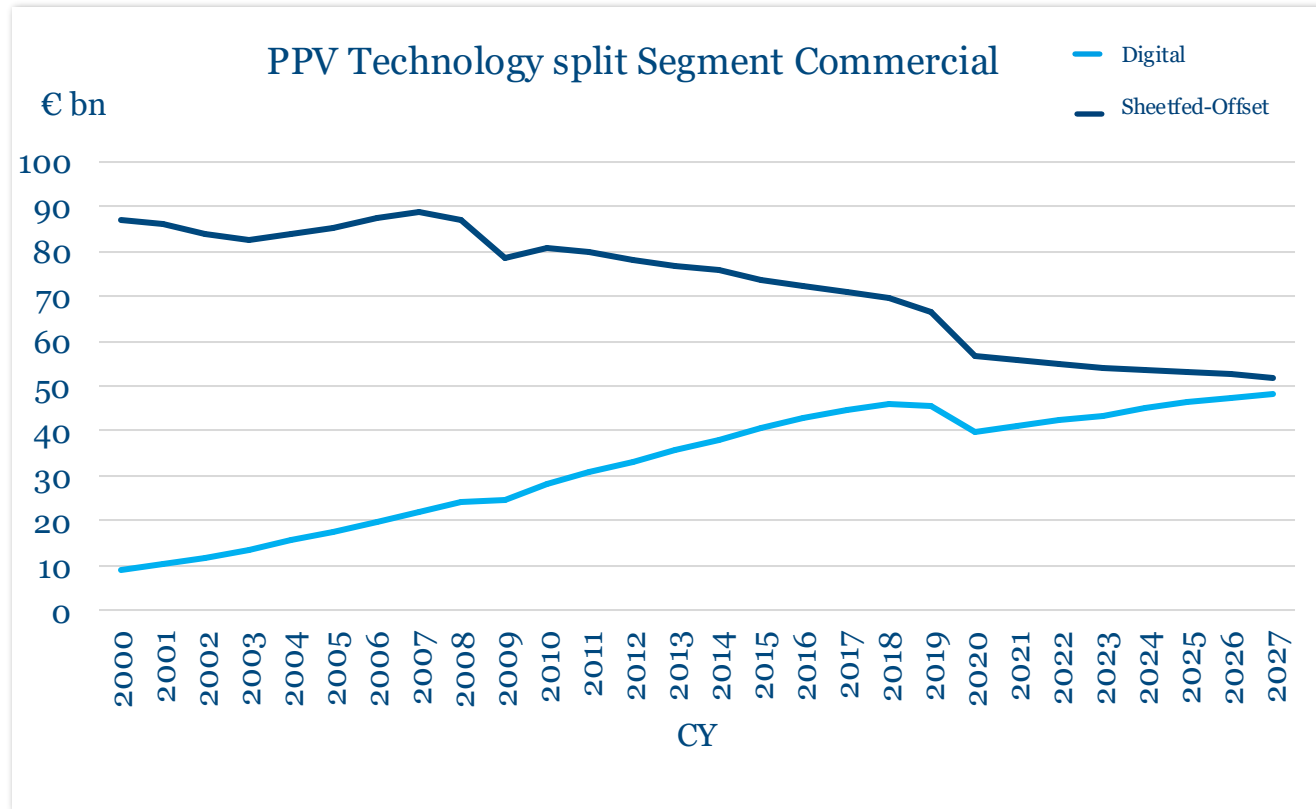
Development (2024-2029)
Total: - 1.4%

- Others: - 2%
- Web Offset: - 23%
- Digital: + 17%
- Flexo: + 10%
- Sheetfed Offset: - 6%

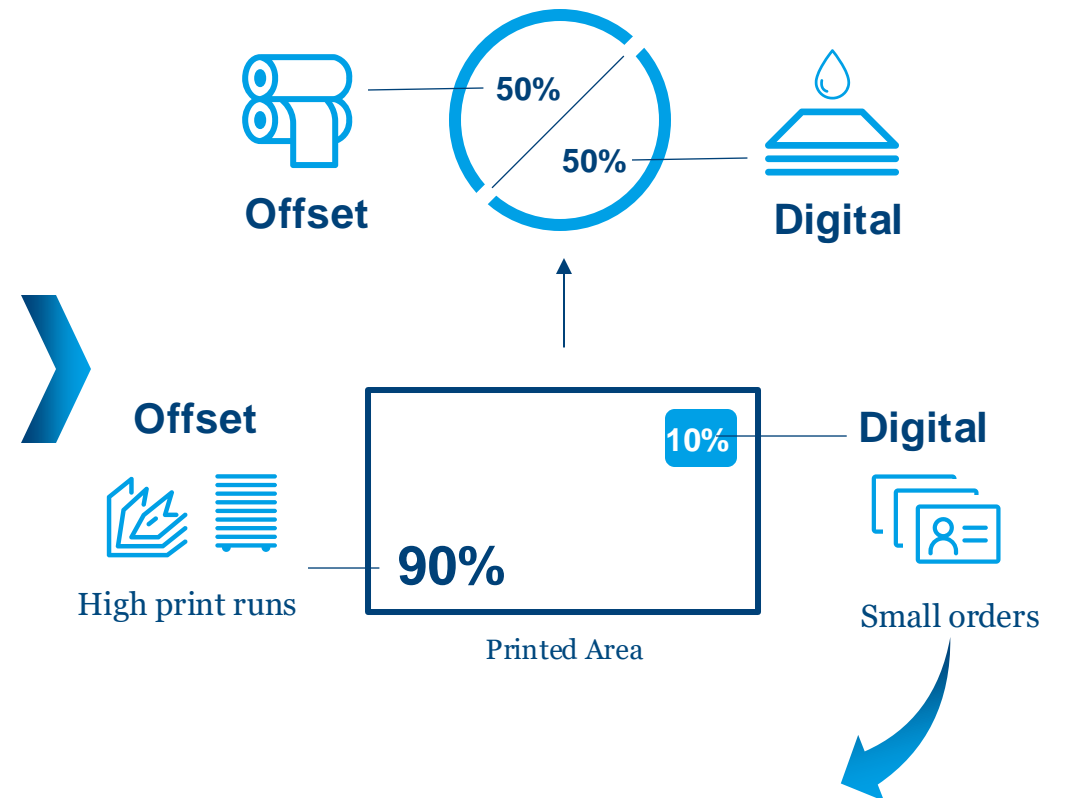
Source: Heidelberg estimate – October 2024, industry statistics, PIRA, RISI, S&P IHS Markit Global Insight
Digital: Only Digital Production Devices are taken into consideration ----- *Base Year 2009

The Future of Print Production Volume in Commercial balanced coexistence of Digital and Offset Printing

PPV / Market Segments



Planned PPV (2027):



Success factor: The software must enable the automation of these orders.

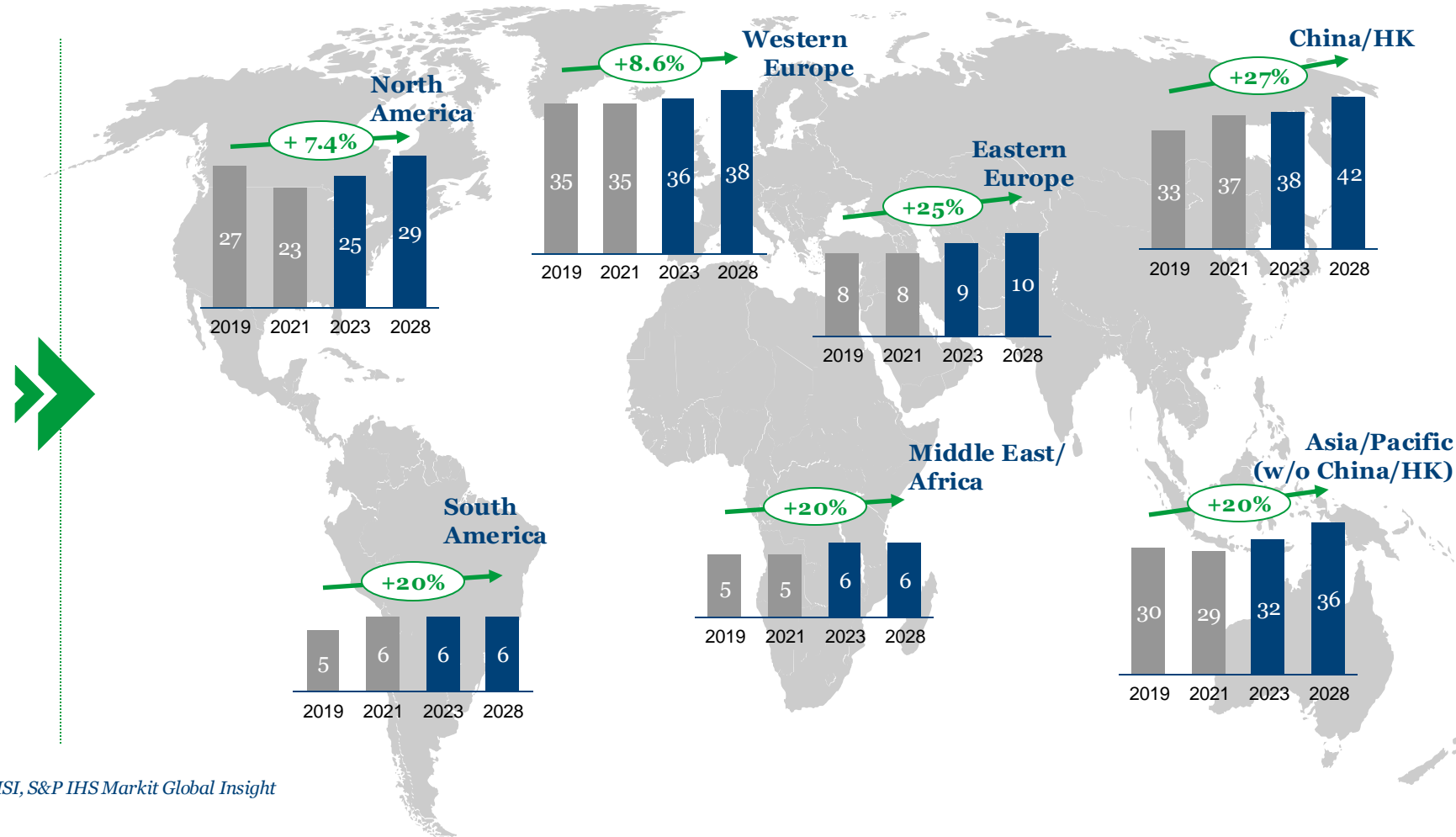
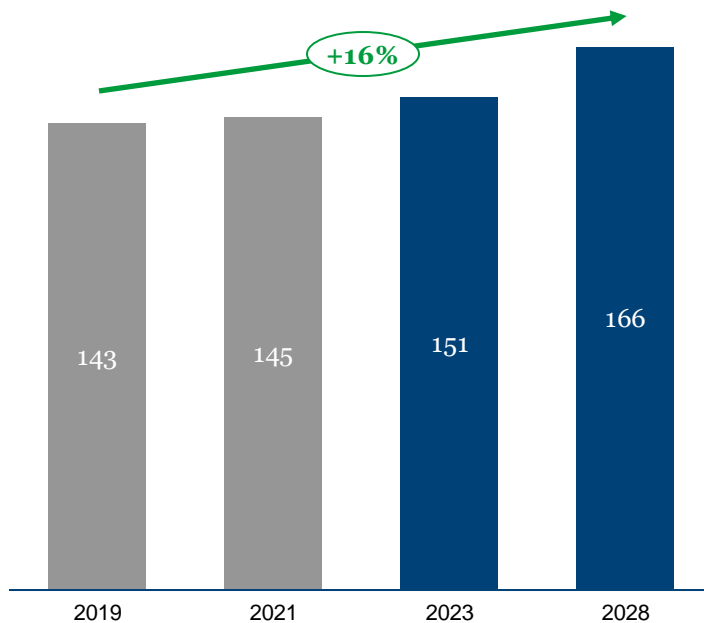
Source: Heidelberg estimate – October 2024

Roughly 50% of the global PPV is driven by Packaging & Labels. Asia-Pacific region with strong growth perspective.

Packaging & Labels Print Production Volume (PPV) by regions

In bn EUR

Total PPV development from 2019 -> 2028



Source: Heidelberg estimate – October 2023, industry statistics, PIRA, RISI, S&P IHS Markit Global Insight
Note: Numbers might not add up due to rounding

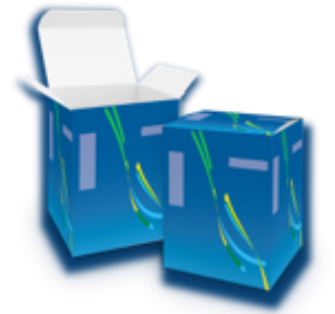


Print segment development Indonesia

Trends in Indonesian Offset Folding Carton Printing



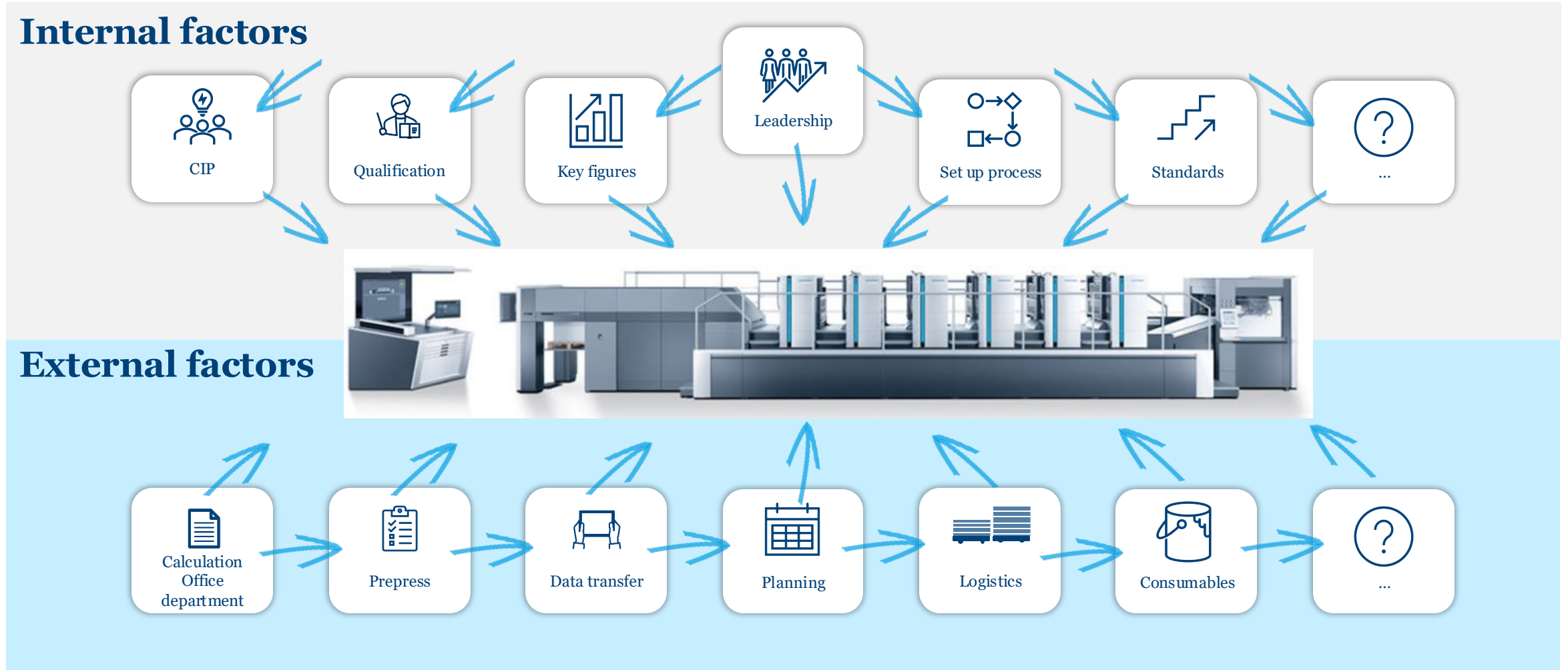
- **Positive volume development** but increased competition in CY2024/2025
- **Food, cosmetics, tobacco increase** while pharma back to pre covid level
- Higher complexity in jobs makes **CX 104-6+L** now the most sold configuration in packaging
- Decrease in run length increases interest for innovative **Multicolor** solution
- More awareness for **TCO, make ready waste, productivity** at major printers



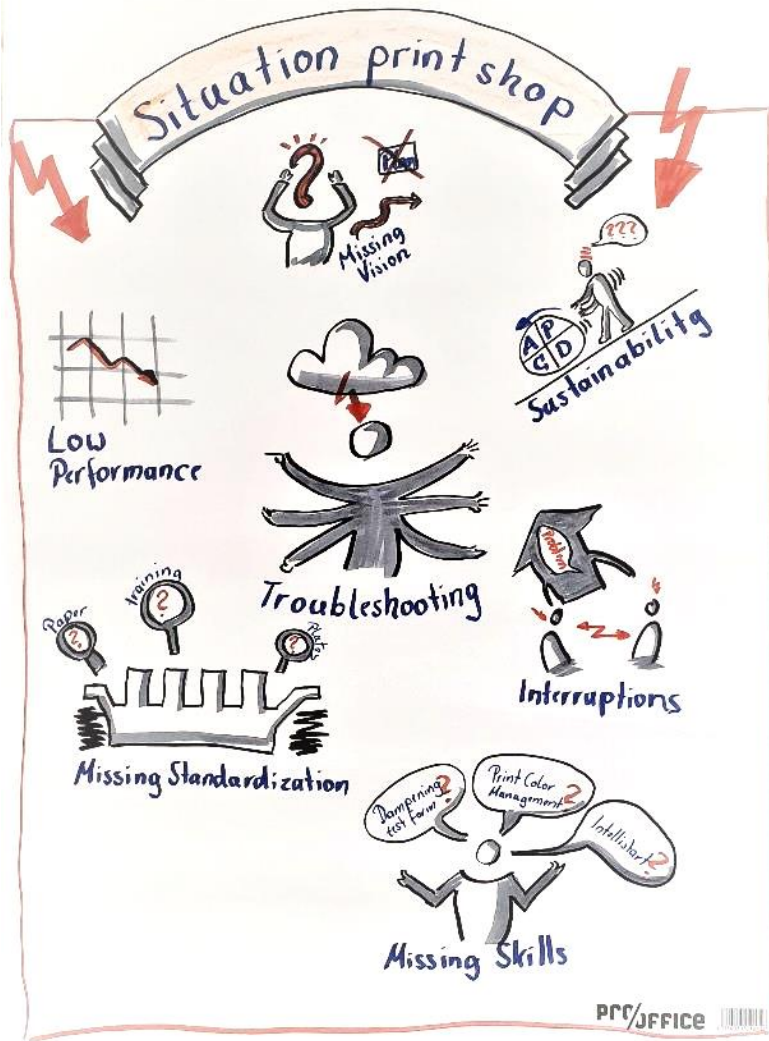
Consulting for our customers by HEIDELBERG



Influencing Factors to machine performance



What is the initial situation in many print shops? What suitable answer is offered by consulting?



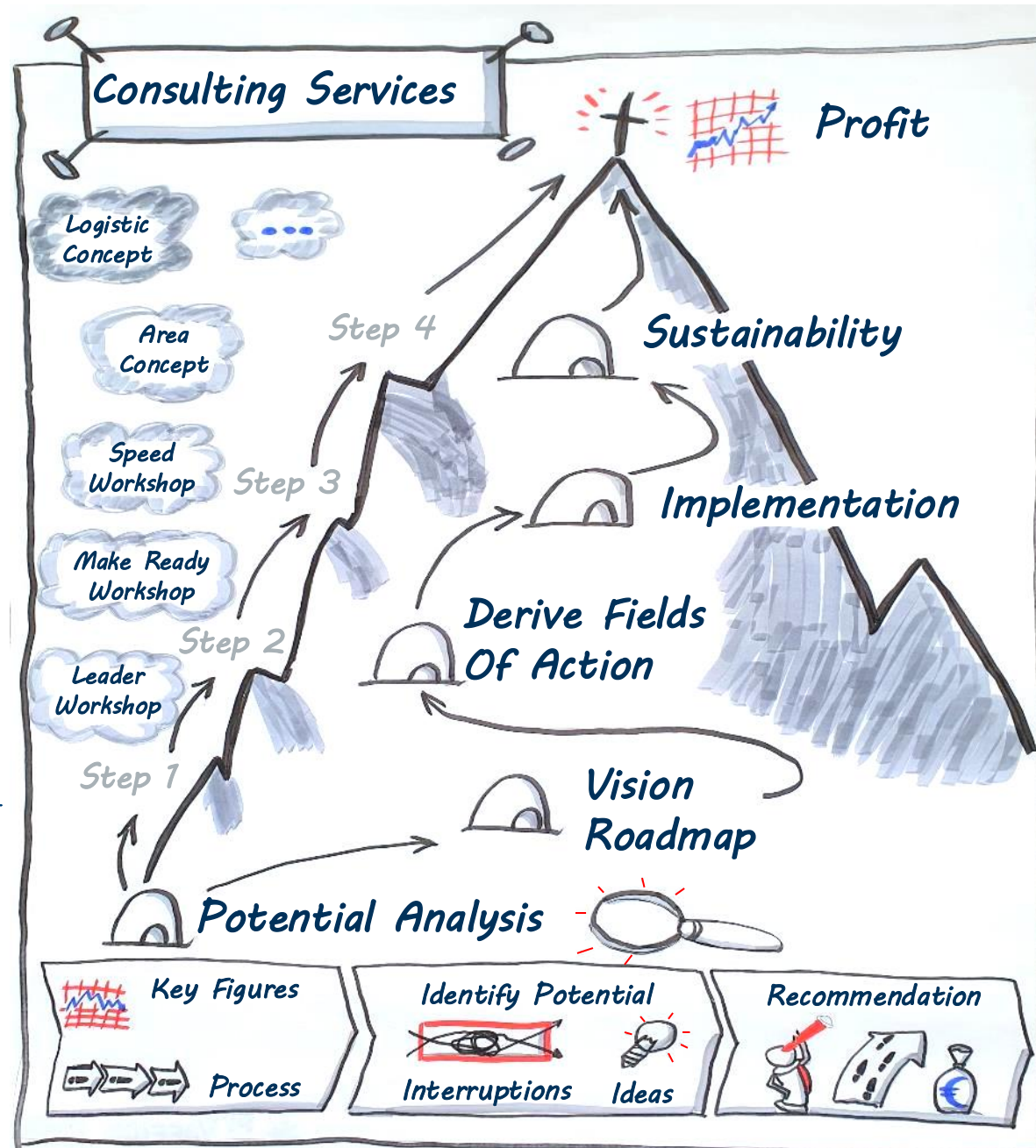
Synchronization of human, machine, process & system



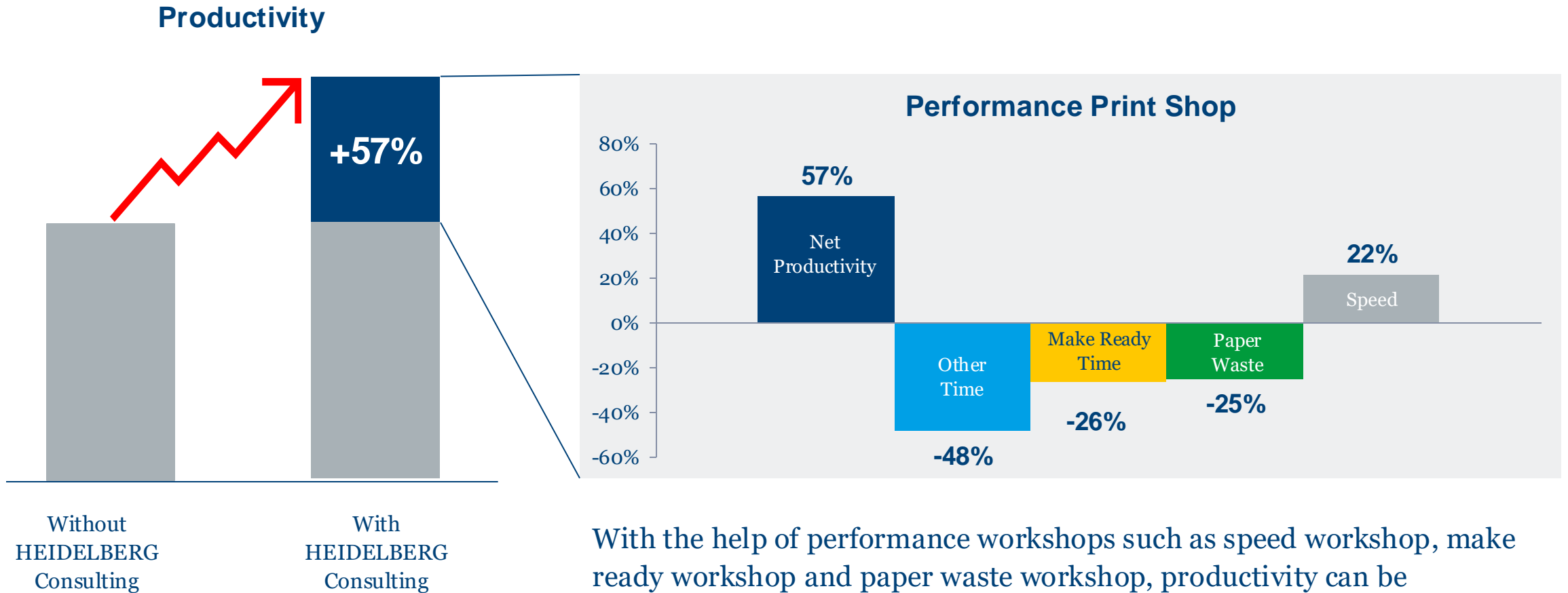
Project procedure. How does a project work?

Common with the management:

- Derivation of necessary projects and qualifications to achieve the target state
- Implementation and sustainability concept



Performance workshop by HEIDELBERG Implemented example



With the help of performance workshops such as speed workshop, make ready workshop and paper waste workshop, productivity can be significantly increased.

Trends in Indonesian Commercial Printing



- Production **volume decline** in Offset not recovered
- Significant **investments in Digital** in second half of CY2024
- Volume at **educational book printers stable** with investments in Offset
- Commercial customers address **short run packaging** segment due to local network
- Concept of **Hybrid printshops** in commercial with integration between Offset and Digital



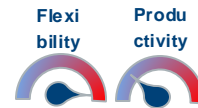
The HEIDELBERG Digital Family with Prinect DFE Solutions for your job structurer

Toner

Versafire LV



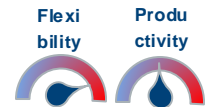
Suggested monthly volume:
50.000-200.000 sheets A4
Format: SRA3, CMYK + special



Versafire LP



Suggested monthly volume:
200.000-400.000 sheets A4
Format: SRA3

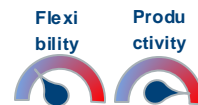


Inkjet

Jetfire 50



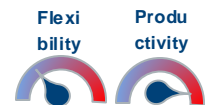
Suggested monthly volume:
1.000.000-5.000.000 sheets A4
Format: B3



Jetfire 75 (soon)



B2 Format inkjet press
Availability to be announced



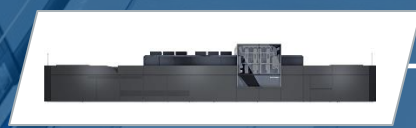
HEIDELBERG Cloud

The Connection with the Prinect Production Manager also enables...



Cloud-based

On-Premise



Jetfire 75 *Planned*



Speedmaster



Production Manager
(Required)



Jetfire 50 *New*



Versafire

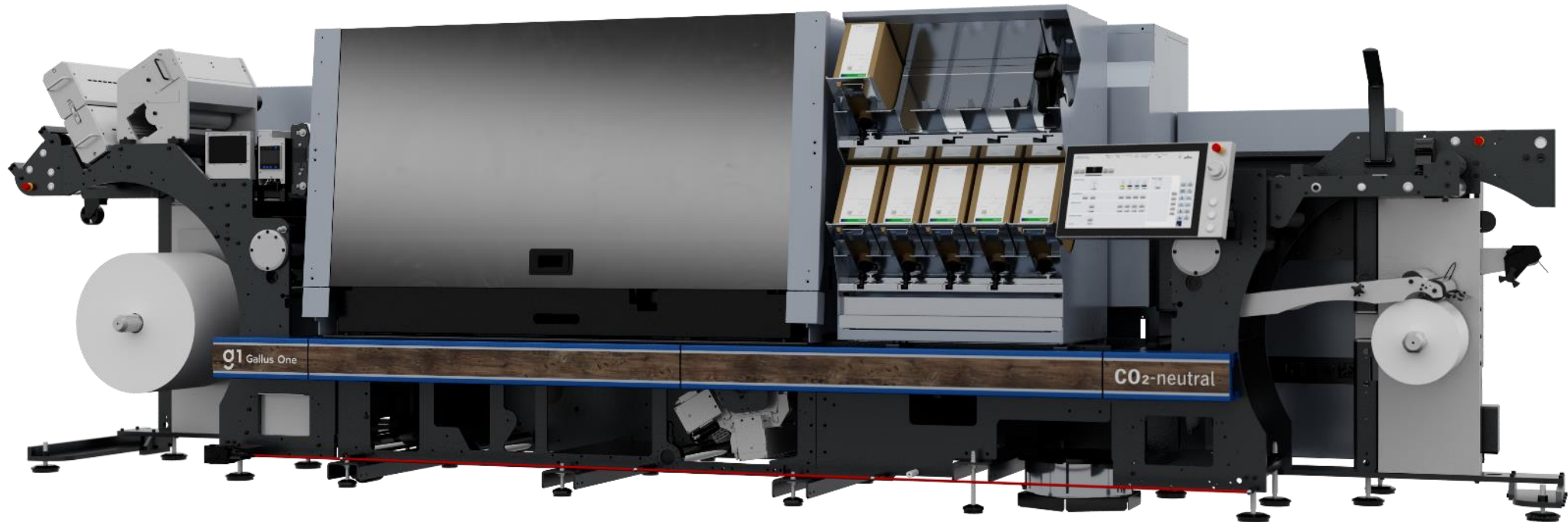
Trends in Indonesian Label Printing



- **Positive development in CY2024** with optimistic prognosis for CY2025
- Significant increase in **demand for short run length & simple labels**
- Major Narrow Web label printers invest into **industrial Inkjet label printing**
- Folding carton printers invest into Narrow Web Flexo to offer **full solution approach**
- **High variety of machine configurations** required due to different customer job profile



The answer to profitable label printing at low run length Gallus One launched in Asia in 2024

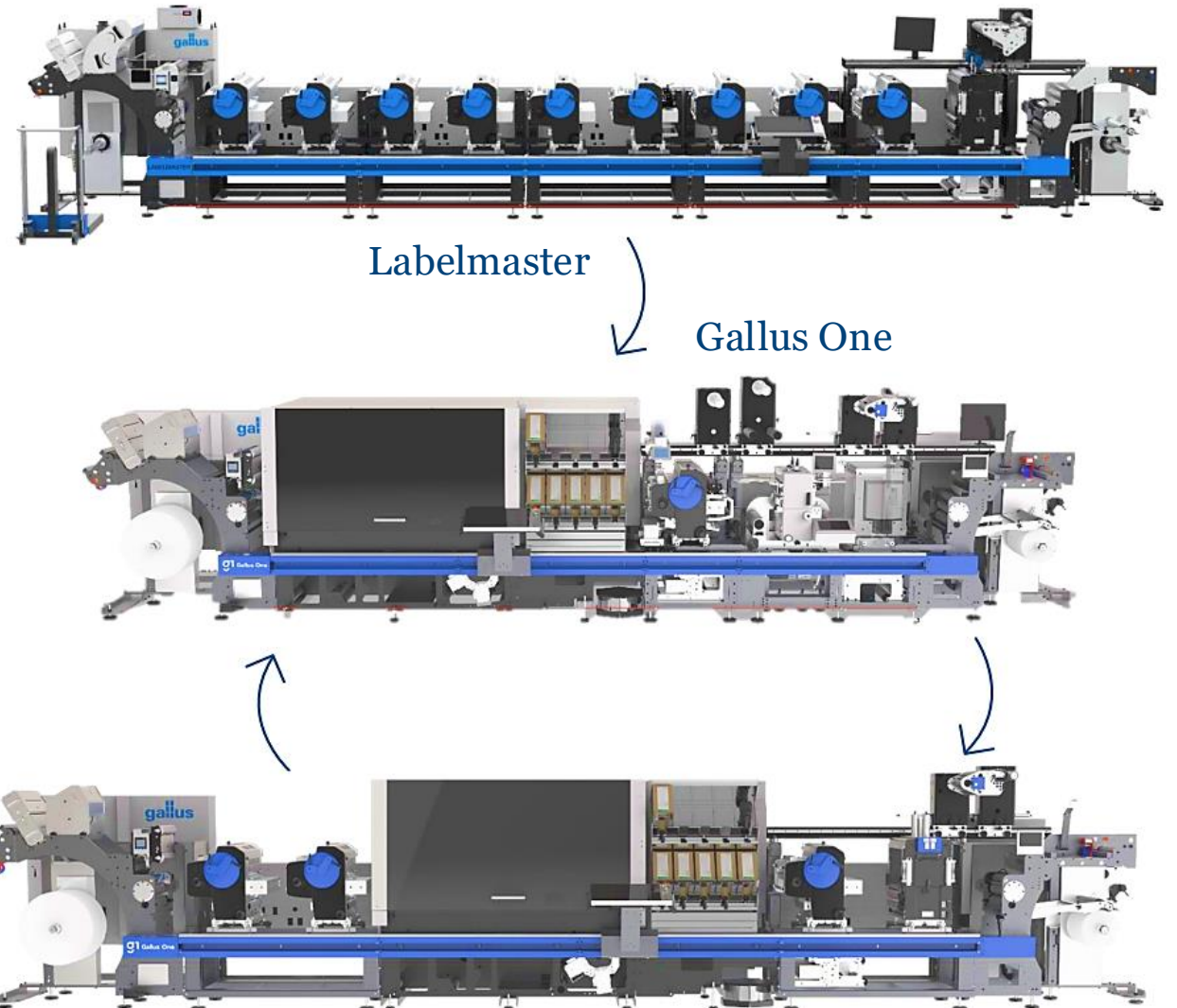


1.200 x 1.200 dpi - white opacity 85% at 70 m/min - CMYK up to 88% Pantone

Modular “System to compose” by Gallus

The key to build the smart printshop of the future

- Future-proof investments
 - Modular solutions
 - Retrofit additional units
 - Enhance setup with new capabilities
- Gallus platform for flexo & digital 340mm & 430 mm
- Additional digital ink options (CMYK, W + OV)
- Additional processing units
- Integrated workflow & service solution



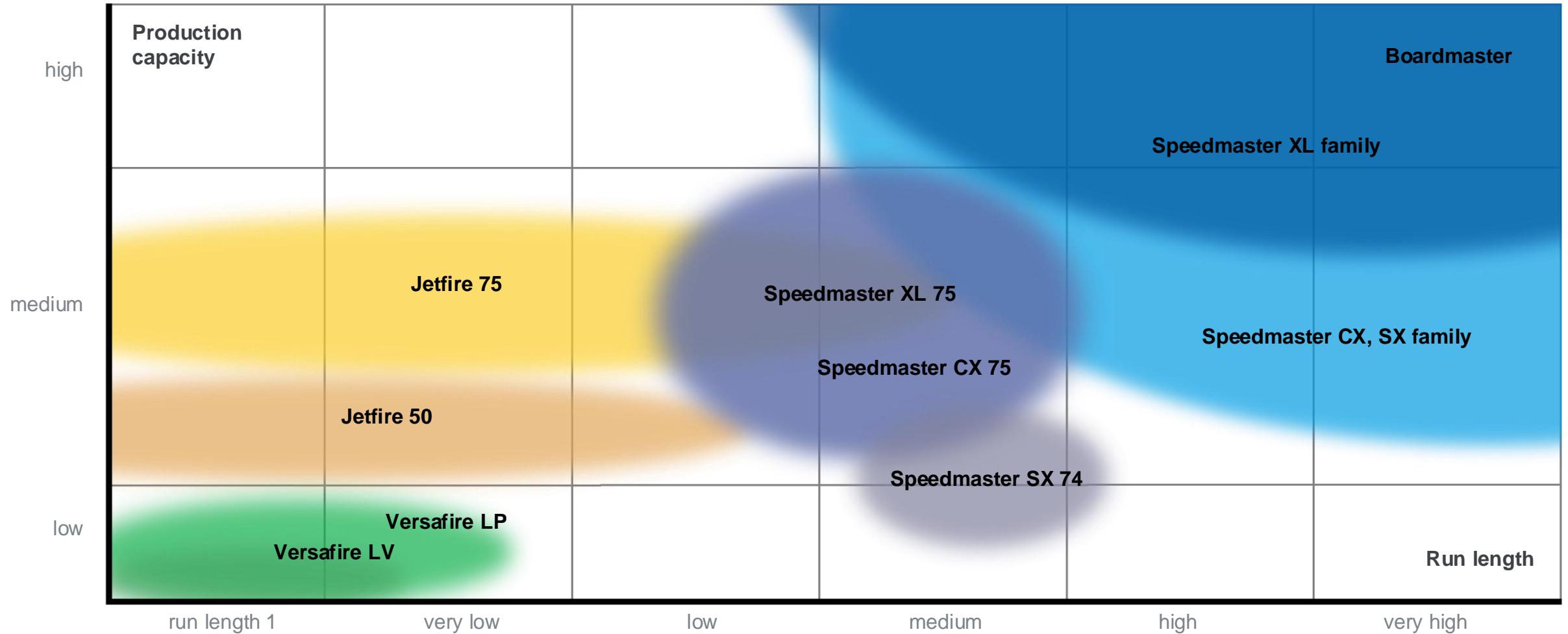
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**Thank you for
your attention!**

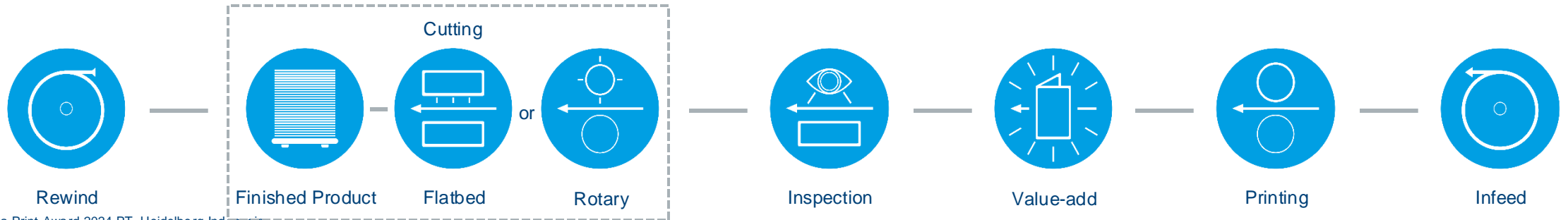
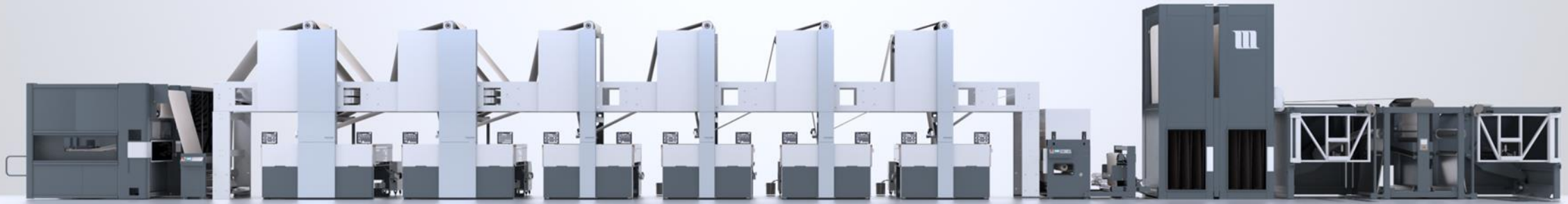


**Backup Slides
for questions**

HEIDELBERG Sheetfed Offset and Digital Printing Portfolio. Performance and flexibility.



HEIDELBERG Boardmaster configurations



HEIDELBERG Boardmaster



Zero changeover downtime

The time you used to spend on setting up and adjusting new jobs can now be put to better use. Switching from one job to the next at a maximum speed of 600 m/min makes for best possible machine up-time.

Introducing AI to the world of flexo

Adjusting impression is the single biggest time loss when operating a conventional flexo press. Boardmaster and Intellimatch automate the entire process achieving perfect impression at the same time.

 <p>90% possible machine availability</p>	 <p>600m/min maximum machine speed</p>	 <p>1650mm maximum print width</p>	 <p>Zero changeover time</p>
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The new Jetfire 50 by HEIDELBERG Highlights

Technology

→ 1200 × 1200 dpi, inkjet with water-based ink

High performance

→ Up to 4,560 A3+ per hour in duplex printing
(equivalent to 9,120 A3+ printed simplex)

→ Up to 2.5 million A3+ per month duplex

Wide range of media

→ Uncoated paper 60 – 350 g/m²

Coated paper 90 – 350 g/m²

Paper thickness 70 – 400 μm

After Sales

→ Service by HEIDELBERG Indonesia



HEIDELBERG/MK Diecutter Portfolio

Machines suitable for your demands



MK Ecocut 106 CS

For entry level packaging with efficient investment cost



MK Easymatrix 106 C / CS

High performance & high productivity



MK Promatrix 106 CSB

Maximum performance, high automation with blanking system

HEIDELBERG Jakarta showroom open for you Please contact us if you want to see

Offline inspection folding carton

Diana Eye 55



Digital Narrow Web Flexo

Gallus One



The end 😊