



Welcome to

**GOING
GLOBAL**

APRIL 2021

5th EDITION





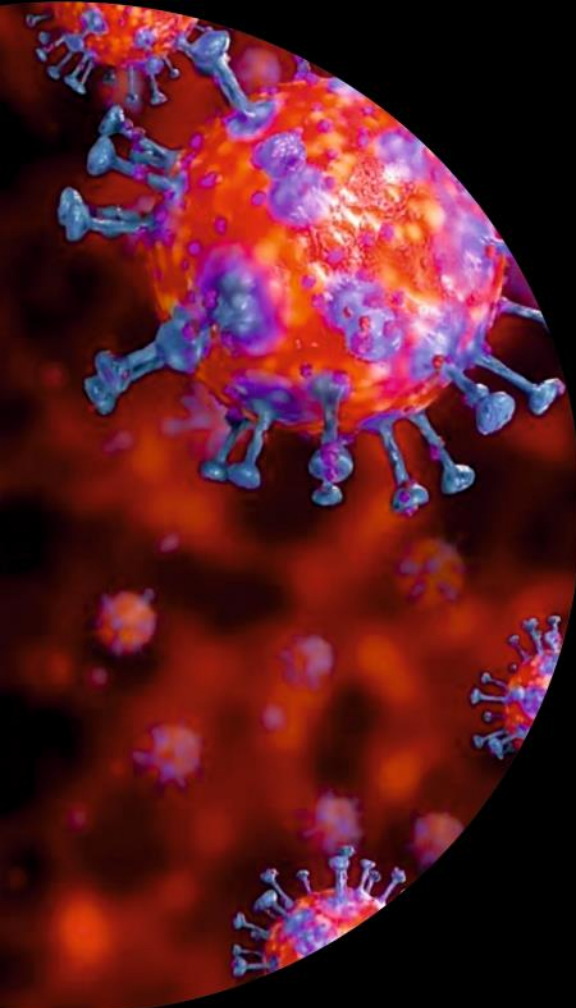
A PRESENTATION BY

MANOJ MEHTA

CHAIRMAN, INTERNATIONAL RELATIONS



**ALL INDIA FEDERATION OF
MASTER PRINTERS**

A large, circular inset image on the left side of the slide shows a detailed, 3D-rendered view of a coronavirus particle. The particle is spherical with a textured, orange and red surface and numerous blue, spike-like protrusions extending from its surface. The background is a dark, reddish-brown with other smaller, blurred virus particles.

**MY DEAR FELLOW PRINTERS,
WE ARE BACK TO THE SITUATION THAT
WE THOUGHT WAS PASSE.
ONLY THIS TIME, NOVEL CORONA VIRUS
HAS IMPACTED LIVES ACROSS THE
SEVEN SEAS, **MORE THAT EVER BEFORE.****

**NOT TO FORGET, IT HAS GREATLY
INFLUENCED TRADE & COMMERCE.
AND PRINT & PACKAGING BUSINESSES
GLOBALLY, ARE NO DIFFERENT.**

A decorative horizontal bar at the bottom of the slide is composed of four colored segments: a pink segment on the left, a blue segment, a yellow segment, and a grey segment on the right.



**SO, THIS EDITION OF GOING GLOBAL
WILL LOOK IN TO COVID-19's
IMPACT ON PRINT & PACKAGING INDUSTRY
IN TERMS OF:**

COUNTRIES

GLOBAL
FORECASTS &
NEW
NORMALS

APPLICATION

HEALTHCARE,
FOOD & BEVERAGES,
HOUSEHOLD
HYGIENE, BEAUTY
& PERSONAL CARE
AND ELECTRICAL &
ELECTRONICS

MATERIAL TYPE

PLASTICS/POLYMERS,
PAPER &
PAPERBOARD,
GLASS & METAL

GLOBAL PACKAGING MARKET

DURING THE COVID-19 PANDEMIC THE TURNOVER IS PROJECTED TO GROW FROM:

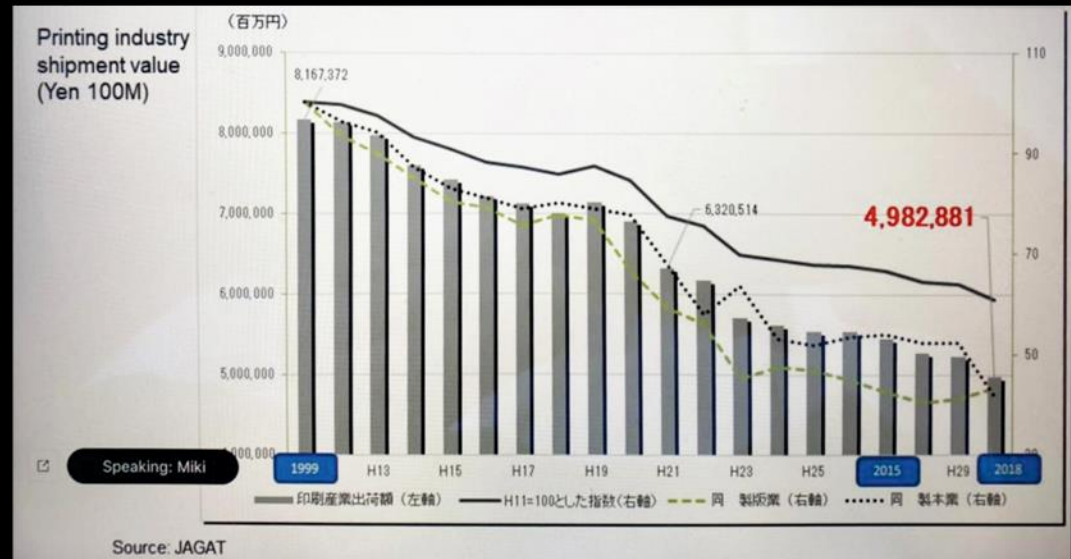
US\$ 909.2 billion in 2019 to US\$ 1,012.6 billion by 2021, at a CAGR of 5.5%.



During the forecast period, the best-case scenario reflects - 9.2% growth; while the worst-case scenario at 2.2% growth. Evidently, its major drivers include the increased demand for FMCG & Pharma as well as the rising e-commerce sales due to lockdown.

COVID-19 IMPACT IN JAPAN

FOR THE FIRST TIME IN
36 YEARS,
THE PRINTING
INDUSTRY SHIPMENT
VALUE FELL BELOW
5 TRILLION YEN



IMPACT ON VARIOUS PRINT SEGMENTS IN JAPAN



- Publishers & Book Stores witnessed the sharpest decline as magazines & papers have been their stable source of income. (Since 2016)
- Commercial & Packaging Market Increased its share
- The Electronic Book Publishing Market increased from 375 Billion Yen in 2019 and is expected to rise 1.5 times to 566.9 Billion Yen in 2024.

Overall, Print volume is expected to continue decreasing & printers will need to add more value for their clients



THE NOW OF MEDIA & PRINTING IN UNITED KINGDOM

As per the Advertising Association, **UK's** advertising spend is expected to decline by 15.6% year-on-year in 2020, reflecting the adverse **effects** that the **coronavirus** pandemic continues to have on advertising and the wider **UK** economy; leading to a huge decline in printable advertising.

-A recent study conducted by **Print Week** clearly stated that about 30 of UK based high street print shops would have to close their business due to Covid 19.

-Also 'Printing London', one of the biggest London based printing service stated that their business fell by 30% because of the Lockdown and Covid 19 effect.

Source: <https://bmmagazine.co.uk/business/covid19-future-of-printing-industry-in-the-uk/>



REAL TIME IMPACT ON UK'S PRINT INDUSTRY

- **Market Size: £10 BN**
- **Number of Businesses: 9,559**
- **Industry Employment: 85,742**

- The second wave of coronavirus is having deadlier impact on life in general; thus becoming a concern for governments, businesses and households
- The weaker demand from a range of key markets, revenue is expected to decrease by 8.7% in 2020-21
- Items that require printing services, such as catalogues, books, and magazines, is expected to decrease.
- The coronavirus outbreak has heavily disrupted global supply chains and the perception of potentially contaminated printed goods have negatively influenced the Printing industry's trade performance. As a result, the printing industry's exports and imports too contracted notably during the pandemic.

Source: <https://www.ibisworld.com/united-kingdom/market-research-reports/printing-industry/>



MOVEMENTS IN INDIA'S PRINTING SECTOR

Paper industry of India provides employment to 400,000 people directly & 1.5 million indirectly.

Paper consumption in India is 15 million tonnes approx. per annum.

It is expected to reach 23.5 tonnes per annum by 2025.

As compared to other industries, **COVID-19** impact on paper and print industry is seen to be lower. Undoubtedly, there is a steep decline in the print volume, digital presence for print media will become critical. It will further translate into greater monetisation opportunities.

INDIA CAN EMERGE AS A SIGNIFICANT GLOBAL PLAYER

It is all a matter of how our Print & Packaging Sector strengthens its capabilities in terms of technology, skills, and efficiency.



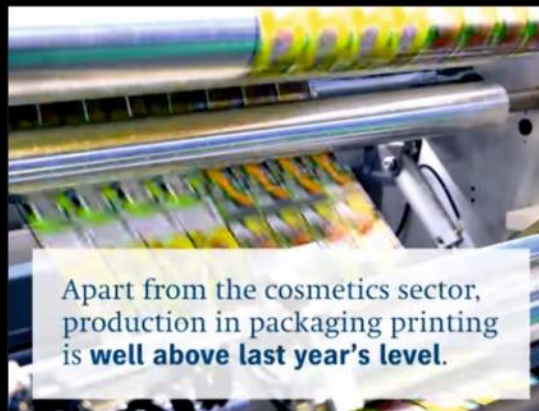
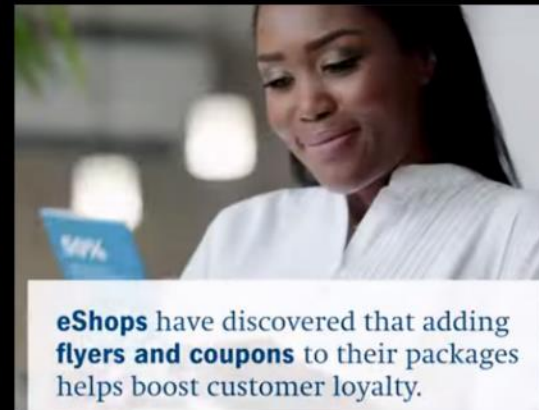
E-commerce is projected to grow rapidly at a CAGR of 27% from 2017 to 2026 to reach \$200 billion by 2026. The current pandemic has further boosted this due to closures of store retailing consequent to the lockdowns. With the impact of the pandemic projected to be long drawn, e-commerce and e-retailing will continue to be a trend beyond the crisis.

THE RESULT?

- The growth of e-commerce and e-retailing has led to transit packaging and omni-channel packaging as the most potential segments — maintaining safety, hygiene, and integrity of goods — and where the Indian packaging industry has considerable scope for expansion.
- In the food service segment, disposable takeaway packaging options have registered higher demand as consumption patterns shift to food delivery.
- Emergence of new food businesses, and local restaurants and food delivery giants launching their own delivery or food takeaway services are warranting new requirements of packaging.



THIS **HEIDELBERG** VIDEO SUMS UP THE OVERALL SCENARIO



Play The Link:

https://www.heidelberg.com/global/en/products/pmi_climate.jsp#video-1426694-0



BUT LIKE THEY SAY,

**“THE DARKEST OF NIGHTS
PRODUCE THE BRIGHTEST STARS”**

**HERE'S AT LOOK AT
EMERGING TRENDS, NEW NORMALS
& BETTER MARKETS.**

A photograph of a labeling machine in operation, showing a roll of paper with a colorful pattern being processed. The machine is white and grey, with various rollers and guides. The background is dark, making the machine stand out.

NEW, EMERGING TRENDS IN LABELING

The year 2020 had a significant impact on consumer purchasing habits, influencing labels and packaging in general.

According to Mordor Intelligence, the print label market is expected to grow at a CAGR of 4.2% over the forecast period (2021 - 2026). These changes and more importantly trends, many of which were already beginning to evolve, started shifting at an increased rate, facilitated by new technologies.

- Pressure-sensitive labels represent the largest segment of growth in labelling (about 40% share). The segment is expected to grow at a CAGR of over 4% through 2026.
- Glue-applied labels are in second place at about 35%.
- Plastics used in labelling such as shrink sleeves and in packaging in general are increasingly the target of sustainably conscious consumers. Even if a label that on its own can be recycled, once applied to a plastic bottle, it can play havoc on the recycling stream. As a result we are seeing more direct-to-object printing in place of conventional labels and even the testing of paper bottles from brands. Absolut, Carlsberg and even Coca-Cola, are classic examples. While they use an inner barrier for the bottle produced from a recycled polyethylene terephthalate (PET) polymer film, it still limits unrecyclable waste.



NEW, EMERGING TRENDS IN LABELING

Technologies

Cost competition between digital and flexo label production has resulted in explosion of inkjet label press solutions as well as hybrid solutions. In the last year, there has been a significant amount of new press introductions in both toner & inkjet technology.

Toner

Digitally printed labels are still currently dominated by electro-photographic presses. Although Konica Minolta & Mark Andy entered the market with their own toner solutions, HP Indigo and Xeikon introduced new models that increase productivity by about 30% over their previous models.

Additionally, HP previewed their Next-Gen V12, based on their LEP^x inline architecture, that is expected to print at a speed in excess of 120 m/min, bringing it in line with inkjet and hybrid inkjet/flexo solutions, further increasing digital competitiveness as compared to flexo.





NEW, EMERGING TRENDS IN LABELING



Inkjet and Hybrid

Zeikon recently introduced **PX30000** to complement their **PX2000** and **PX3000** UV inkjet label presses, based on their Panther platform providing a higher level of productivity over their toner line.





Mark Andy, has continued to increase their digital offerings with the Digital Series iQ powered by the Domino N610i UV inkjet module in addition to their Digital Series HD, the configurable hybrid press.

Canon, which is not new to inkjet but new to the packaging market has started placing their LabelStream 4000 hybrid label press as well.

Memjet OEMs like Colordyne & Konica Minolta are increasingly integrating their print-heads into a variety of different inkjet and hybrid machines to support label print applications.

Embellishment

Brand identity and shelf appeal are being enhanced with digital embellishment technologies. JetFX, Actega, MGI and others are providing the solutions needed to support the needs of on-demand label printing. Increasingly they are integrated into complete inline label production with solution like the FEU offered by Xeikon and the HP GEM.

2020

REDEFINING THE WAY IN WHICH WE WORK.



In a time of limited resources, technology provides people with more resources to work in the way that they please.

The year 2020 saw a lot of firms shutting shop & professionals losing their jobs. Across the media industry, the year saw a surge of individuals considering freelancing as a long term career.

FREELANCING, A GROWING PHENOMENON

- India alone had about 15 Million Freelancers – making it the second highest in the world
- With 10 Million professionals who lost their jobs (and still jobless) will seek freelancing as a full-time career
- An average freelancer earns about Rs.500 per hour
- Web Designing, Content Writing, Production Units, Graphic Designing need their services
- With over 57 Million Freelancers in the USA, the Indian Freelancer has a scope of growing atleast 5 times from here
- Owing to their high standards, organisations worldwide have already started hiring Indian talent



THE DIGITAL ERA

Time and again, we have discussed how the **Future is Digital**; but the year 2020 actually accelerated the Digital Era like never before.

While there is no substitute to actual, physical schooling or personal interaction in a corporate environment or shopping at a mall, the World Wide Web has definitely aided communication in isolation.



WORK FROM HOME & WORKING FROM ACROSS GEOGRAPHICAL BOUNDARIES



It is estimated that 56% of the U.S. workforce have jobs that are compatible (at least partially) with remote work. Currently, only 3.6% of the employee workforce works at home half-time or more.

It is estimated that about 25-30% of the workforce will work at home on a multiple-days-a-week basis by the end of 2021 .

- It is said that there is no easier, quicker, and cheaper way to reduce your carbon footprint than by reducing commuter travel.
- Statistics say that a typical employer can save about \$11,000/year for every person who works remotely half of the time.
- Work-at-home will save U.S. employers over \$30 Billion a day in what would have otherwise been lost productivity during office closures due to COVID-19



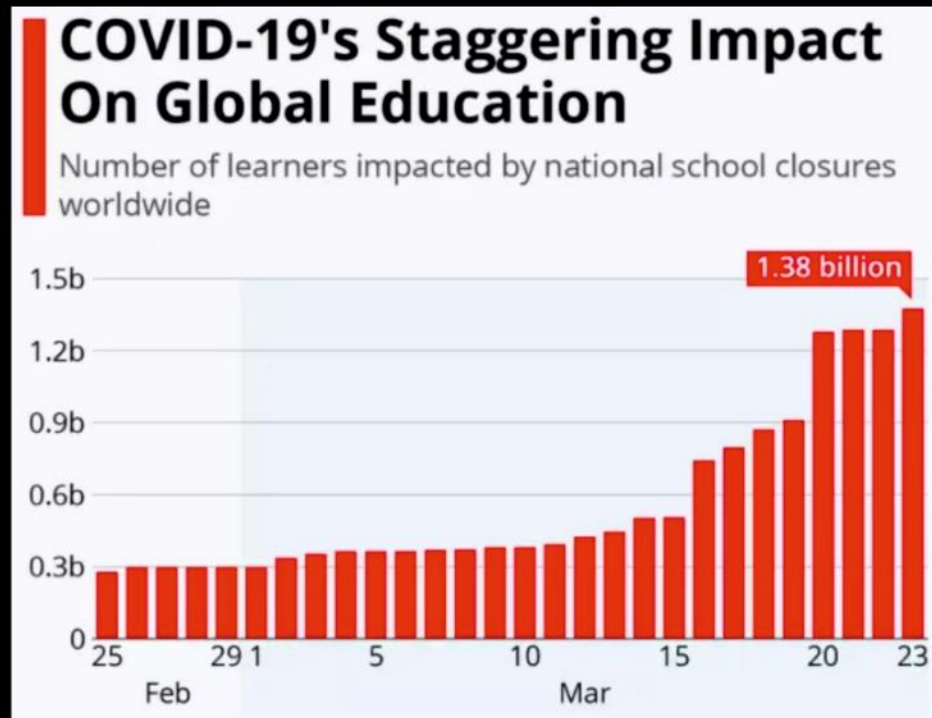
Source: <https://globalworkplaceanalytics.com/work-at-home-after-covid-19-our-forecast>

STUDY FROM HOME

ONLINE EDUCATION, ACTIVITIES & VOCATIONAL GUIDANCE

Covid -19 has changed education forever. More than 186 countries have now closed schools nationwide, impacting nearly 1.2 Billion students globally. This is unprecedented; the world has never seen this many children out of school at the same time.

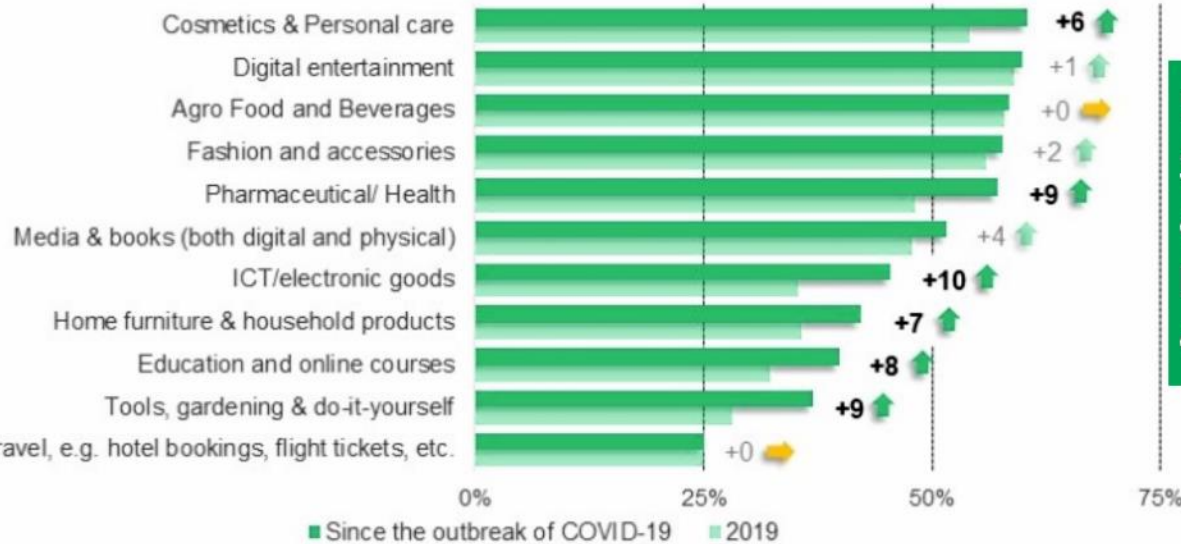
**THUS GIVING RISE TO
BETTER GRAPHICS, MEDIA
EXPOSURE, E-LEARNING
PACKAGING & MORE**



THE COVID-19 EFFECT ON E-COMMERCE

More & more consumers are turning to e-commerce and digital solutions in Brazil, China, Germany, Italy, the Republic of Korea, Russian Federation, South Africa, Switzerland and Turkey.

% of active online shoppers conducting at least one online purchase every 2 months.

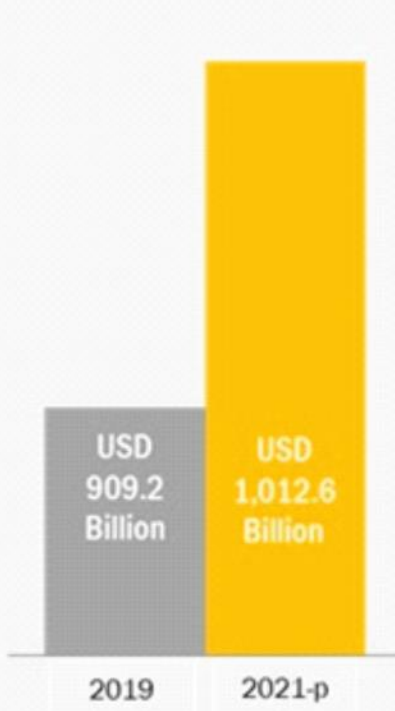


Here is a Percentage of Shoppers across categories, who make at least one online purchase every 2 months

...AND HERE'S HOW IT HAS AFFECTED THE PACKAGING BUSINESS.



Growth Opportunities in the Packaging Market During Covid-19 Pandemic



CAGR
5.5%

- The global packaging market was USD 909.2 billion in 2019 and is projected to register a CAGR of 5.5% between 2019 and 2021.
- The major drivers for the packaging market include the increased demand for FMCG and pharmaceutical packaging and rising e-commerce sales due to lockdown.
- China, Japan, Germany, France and the US are expected to witness high consumption of packaging products between 2020 and 2021 due to increasing demand for healthcare products, such as syringes, vials, and cartridges.

Note: p-projected

UNARGUABLY, **PHARMA** IS ONE OF THE FASTEST GROWING SECTORS.

Healthcare packaging products, such as syringes, vials, and cartridges, are required on a large scale to fulfil the increasing global demand.



THIS IS FOLLOWED BY FOOD & BEVERAGES, HOUSEHOLD
HYGIENE PRODUCTS, BEAUTY & PERSONAL CARE AND
ELECTRICALS & ELECTRONICS.

A collection of various plastic bottles and containers in different colors (blue, green, yellow, white) and shapes, arranged on a white surface. The bottles vary in size and design, including some with caps and some without.

PLASTIC PACKAGING WILL RULE THE ROOST

The COVID-19 crisis has revealed that, since the demand from many end-use industries such as food & beverage and healthcare is growing, the use of plastic packaging will also see a significant rise during this period.

However, more & more companies are developing sustainable packaging that is also user friendly.

ECO-FRIENDLY & USER-FRIENDLY PACKS



A joint venture between Yorkshire-based packaging supplier JM Packaging, and FEI Foods, a contract packer based in South Wales developed the first retortable, microwavable and recyclable stand up pouch.

FEI Foods is reported to be Europe's largest processor of ready to eat rice & grain pouch products. The mono-material pouch is made up of a dual laminate of PP (polypropylene) combined with retort-stable inks and gravure printing process.






MEGA-TRENDS IN PACKAGING ACCORDING TO McKINSEY & CO.

- **Consumer packaging.** Here, the demand is likely to shift drastically. With shutting down of restaurants and food-service outlets, consumers will move to grocery purchases, for which packaging demand will rise. All thanks to stockpiling and panic purchases of food, beverages, and home-care necessities. But non-food and premium-good packaging will face/is facing a big hit as stores are required to close and consumers are cutting back their spending.
- **Healthcare packaging.** There is a magnificent rise across diverse healthcare-packaging types and related substrates, including flexible blister foils, pumps, closures, and rigid plastics. Similarly, demand is escalating for packaging used in dietary supplements, such as vitamins, as well as for essential supplies, such as allergy medication, that consumers will need in a lockdown situation.
- **Industrial, bulk, and transportation packaging.** Its high demand is closely linked to GDP trends & the level of industrial activity, so the sharp decline related to COVID-19 leads to a reduction in packaging demand.

However, some of this is being offset by industrial customers stockpiling purchases of intermediate bulk containers and drums, which causes a temporary spike in demand. At the same time, several segments—such as packaging for the food and pharmaceutical industries—continue to see robust demand. High growth in demand for corrugated packaging for e-commerce and grocery deliveries is also offsetting some demand lost elsewhere with industrial customers.

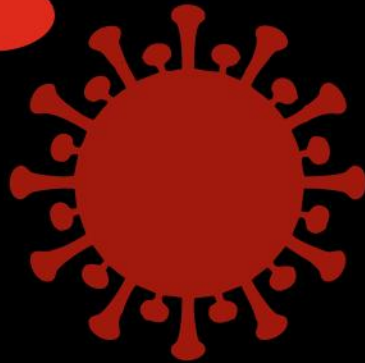
McKinsey & Company

A large, stylized red virus icon with many protruding spikes is positioned on the left side of the slide, serving as a background for the main text.

**ALL IN ALL,
THE PANDEMIC HAS
DEFINITELY
IMPACTED OUR
LIVES &
BUSINESSES,
ON THE WHOLE.**

A medium-sized, stylized red virus icon with many protruding spikes is positioned in the upper right area of the slide.

**IT HAS SHOWCASED
COMPLEXITIES.
BUT ALSO, NEW TRENDS
& POSSIBILITIES**



MY DEAR FELLOW PRINTERS,

*IT IS TIME WE LEARN WHAT REALLY MATTERS,
TRAIN OUR MIND TO SEE OPPORTUNITIES IN ADVERSITIES,
AND BE POSITIVE AMIDST THE NEGATIVITIES.*



Click to Watch a Tribute by Various Artists:



UNTILL WE MEET AGAIN, 
TAKE CARE,
STAY SAFE & **HAPPY PRINTING.**

GOD BLESS!





THANK YOU  U

