



**FORTUNA****DIGITAL**

**FORTUNA DIGITAL 2014**

04.03.2014 D PRINT

VICE STANIC – IZVRŠNI DIREKTOR FORTUNA DIGITAL GRUPA

## O nama

- Tvrtka Fortuna komers d.o.o. osnovana 1990.g
- Poslovni prihodi grupe 2013 – 6,8 mil eur – porast od 30% ->2012
- Zaposlenih – 30



### FORTUNA DIGITAL GRUPA

- Hrvatska
- Slovenija
- Srbija
- Crna Gora
- Kosovo
- Mađarska
- Češka
- Slovačka



# FORTUNA DIGITAL

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## PRODAJA

- NOVI STROJEVI
- RABLJENI STROJEVI
- MATERIJALI
- SOFTWARE

## SERVIS



## SAVJETOVANJE

- NOVI STROJEVI
- RABLJENI STROJEVI
- MATERIJALI
- SOFTWARE
- GDJE I ZAŠTO?



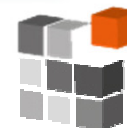
## PARTNERSTVO

\*\*\*\*\*



ZAŠTO DIGITALNO?

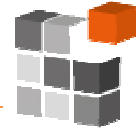
**Živimo u svijetu koji se mijenja**





Passion about customers

FORTUNA DIGITAL



# With HP 2 steps ahead in Industrial Digital Printing



Joerg-Peter Kober, Market Development Manager HP Scitex, Germany/Central & Eastern Europe  
Doru Stoican, Partner Account Manager HP Latex, Central & Eastern Europe

Zagreb, 4. March 2014



# **1. Markets & Trends Technology & Solutions**



## Global trends



**Content  
Explosion**

**25**

petabytes of content created every day  
= 70x larger than the Library of Congress<sup>1</sup>



**Mobility**

**13%**

of web traffic is via mobile more than double last year<sup>2</sup>



**Social**

**24%**

increase in total time spent on social mediums between  
Jul 2011 and Jul 2012<sup>3</sup>



**Green**

**2<sup>nd</sup>**

is the ranking the environment plays in consumers minds<sup>4</sup>

**Mass Communication to  
Cross Media / Personalization**

**Variable data printing growing at  
21% year over year<sup>5</sup>**

**Source:** 1. NC State University - Managing Innovation in the Merger Mania Era, 2. Informa WCIS, 3. Nielson 2012 Social Media Report, 4. GoodPurpose 2012 Global Consumer Survey, 5. 2011 Direct Mail Trend of the Year: VDP

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# Why...?





**Everything that can, will become digital**

**Printing is no exception**

Benny Landa, Founder of Indigo

herein is subject to change without notice.



# Print is relevant at a fundamental level

The HP print deprivation study

**“I didn’t realize how much print there was until I started covering it up!”**

- U.S. Experiment Participant

## Print:

- Allows **discovery**
- Is **intrusive/persistent**
- Is **emotional**
- Allows **deep/complex interaction**
- Allows **story telling**

**100% agreed that they could not live without print**

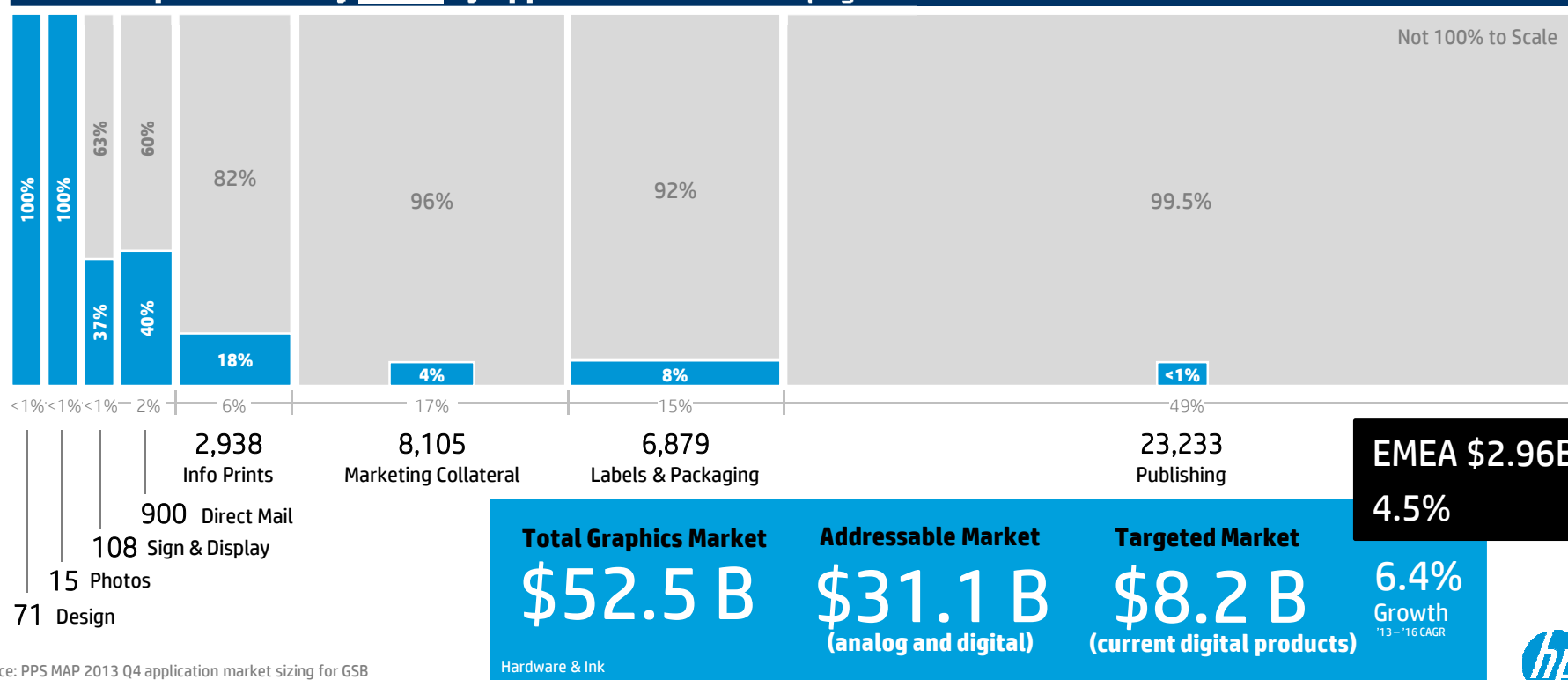


# Significant page growth opportunity for digital

Digital represents <5% of the 47.2 trillion graphics pages

■ Analog Pages ■ Digital Pages

## 2013 Graphics industry pages by application (billions of pages)



Source: PPS MAP 2013 Q4 application market sizing for GSB

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# HP Graphics Solutions Business (GSB)

HP GSB represents all digital printing outside of the home or office. HP is uniquely positioned in the industry to lead the transformation occurring across all application areas.

**Design**



**Photography**



**Sign & Display**



**Direct Mail & Info Prints**



**Marketing Collateral**



**Labels & Packaging**



**Publishing**



# HP Large Format Graphics Portfolio

For the broadest range of applications

## UV – curable inks (HP Scitex)

New



HP Scitex FB10000 Press



HP Scitex FB7600 Press



HP Scitex TJ Series



HP Scitex XP Series



HP Scitex FB700/FB500

## Latex inks (HP Latex)

New



HP Latex 3000



HP Latex 820/850



HP Latex 280



HP Latex 260/210

## Photo inks (HP Designjet)



HP Designjet Z6200 series



HP Designjet Z5200 series

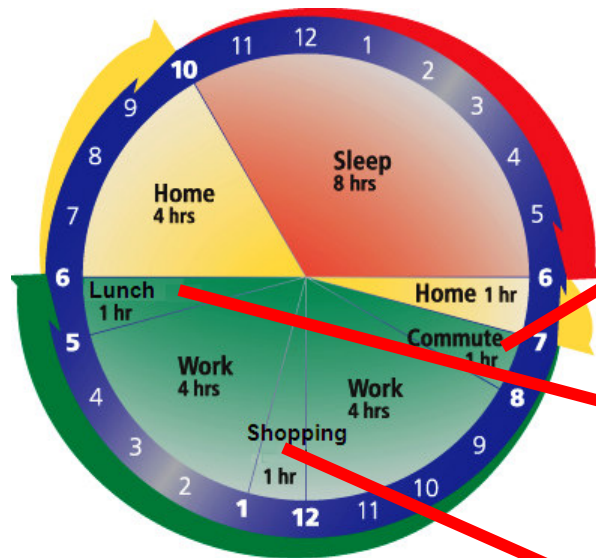


HP Designjet Z Photo series





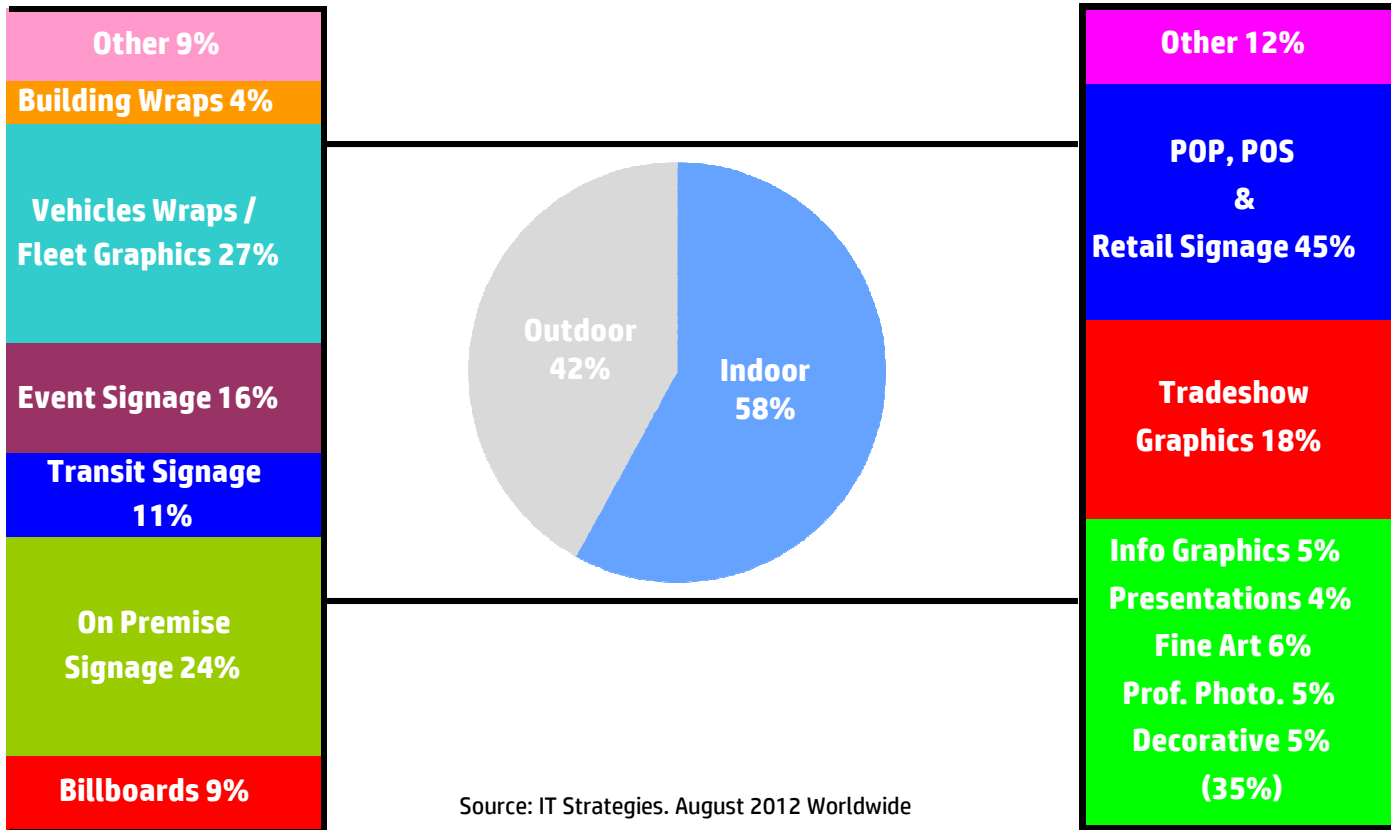
# A Day in life....



- Out of home exposure (11 hours)
- In home media exposure time (5 hours)
- Sleep (8 hours)



# Large Format Digital Applications



Source: IT Strategies. August 2012 Worldwide



# Introducing the HP Latex 3000 Printer

A breakthrough combination of image quality, application versatility and industrial productivity. Plus the environmental advantages of water-based inks.



# Leading application versatility

Cover all your applications: high-value indoor and economical outdoor

## POP Posters

- Wide variety of papers – photo papers, photorealistic, low cost uncoated, blueback paper
- Range of print modes – to suit quality of paper and intended application



## Lightboxes

- Fine details and saturated colors – convey a sense of quality that brands look for
- Alternative to Lambda – half the cost to produce, plus a much easier workflow



## Vehicle Graphics

- Instant dry – laminate immediately
- Flexibility – conforms to surfaces
- 2dE2000 color consistency – edge to edge panel matching



# Leading application versatility

Cover all your applications: high-value indoor and economical outdoor

## Outdoor and Event Banners

- Scratch resistance comparable to hard solvent – avoid accidental damage
- Outdoor display permanence up to 3 years unlaminated
- Fast economical print modes



## Interior Decoration

- Wide variety of wall coverings and canvases
- Odorless prints – ideal for sensitive areas
- HP WallArt solution



## Temporary Textiles

- Easy to use solution, compared to dye sublimation
- Ink collector – accessory from early 2014



# Times are changing...Packaging too



1984



2013

**Messages everywhere**  
**Package has two functions:**  
**containment & message**

**Stronger demand for innovation**



**QR codes**



**Smartphones**



**Security & Authentication**



**Augmented reality**



**Creativity**



**Events**





# Example: Personalization with HP digital



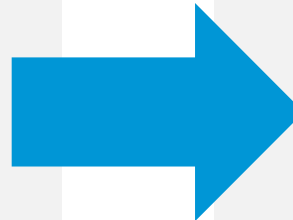
- 32 countries
- 30 different languages
- >800M labels delivered
- **HP Indigo WS6600**



# Expanding into corrugated

## Sign & Display

~6.9 Bsqm 62% analog



## Corrugated Displays and Boxes

~87 Bsqm, 99% analog



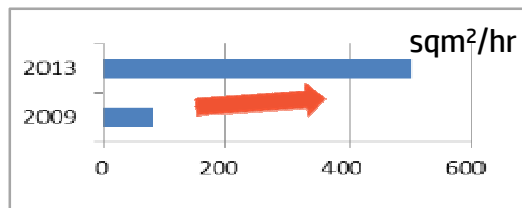
## And we already started.....

- 20% of FB7600 are installed at PKG customers
- A new platform suited to corrugators introduced

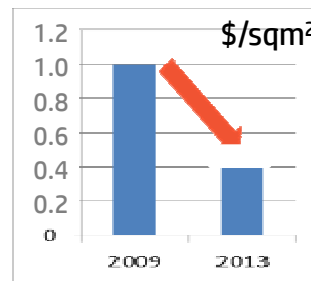


# Digital printing is changing too ...

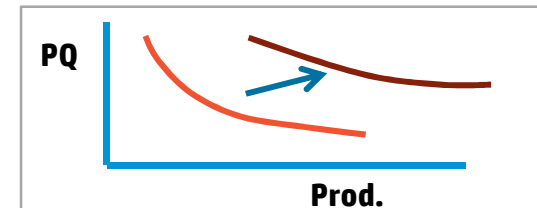
Productivity



Cost per Copy



Print quality



## Already doing more in the corrugated market



Shipping Containers

<0.2\$/sqm



FMCG packaging

0.8\$/sqm



Shelf ready packaging

1\$/sqm



Hi Impact consumer Packaging

1.2\$/sqm

2\$/sqm



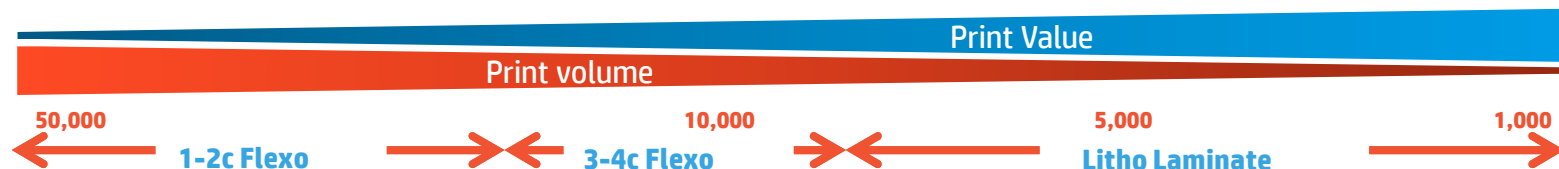
Temporary Displays

5\$/sqm



Permanent Displays

10\$/sqm



# As the digital market leader, the packaging opportunity is strategic to HP



## Labels

- **\$600 million TAM**
- **1 billion units**
- **+31% CAGR**



## Flexible Packaging

- **\$200 million TAM**
- **2 billion units**
- **+31% CAGR**



## Folding Cartons

- **\$1 billion TAM**
- **1.2 billion units**
- **+50% CAGR**



## Corrugated

- **\$1.5 billion TAM**
- **87 billion sqm**
- **+50% CAGR**

## Packaging



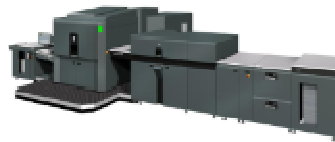
**#1**



**HP Indigo WS6600**



**HP Indigo 20000**



**HP Indigo 30000**



**HP Scitex FB7600**



**HP Scitex FB10000**

**NEW**

## Proven success

TAM = Total Addressable Market

CAGR = Compound Annual Growth Rate for Digital

Source: HP Internal. Expected revenue CAGR from FY12 to FY20

**1350**

Presses for  
labels installed

**>200**

HP Scitex FB7X00 Series  
Industrial presses  
installed



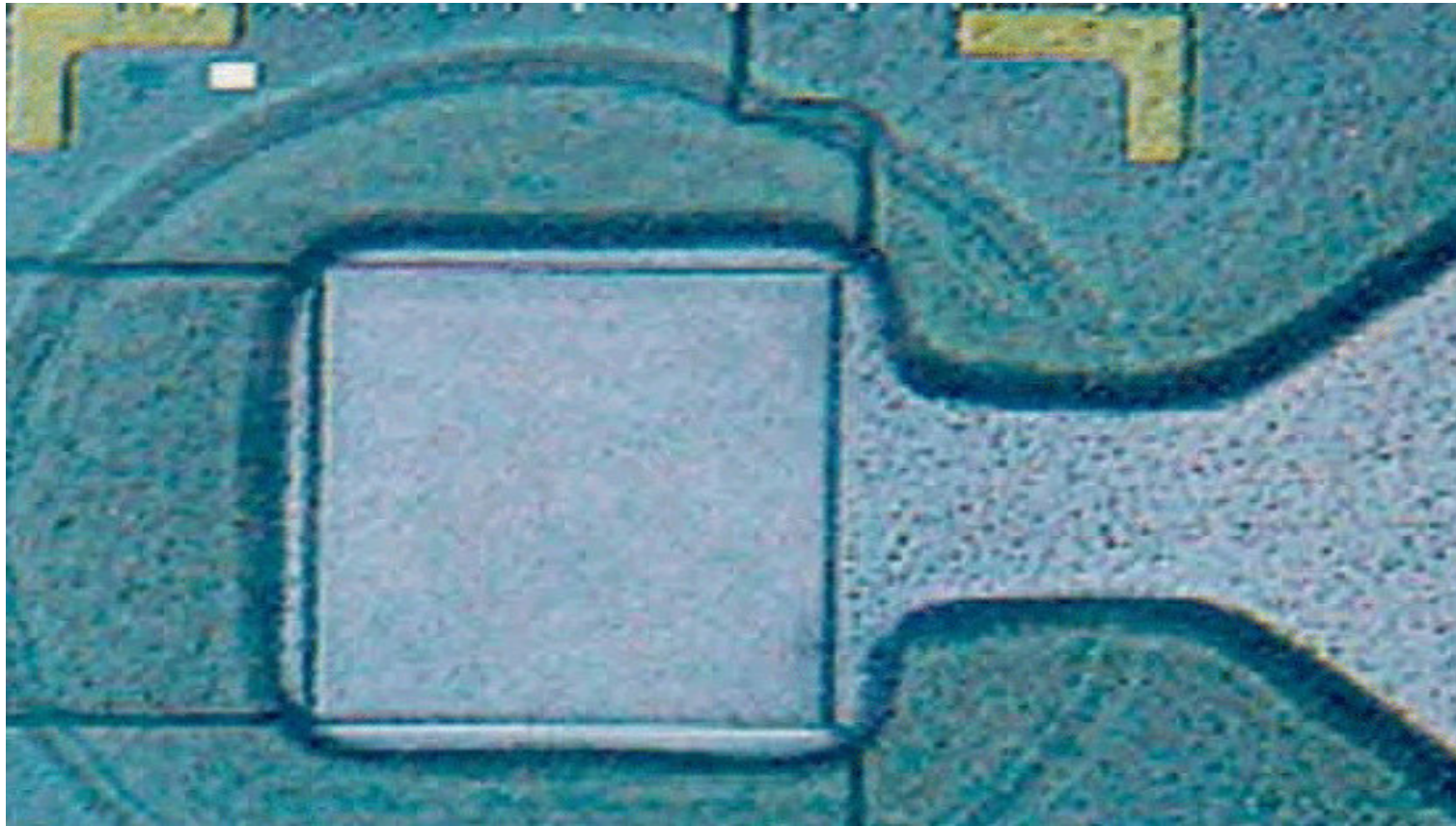
# STi Group, Germany



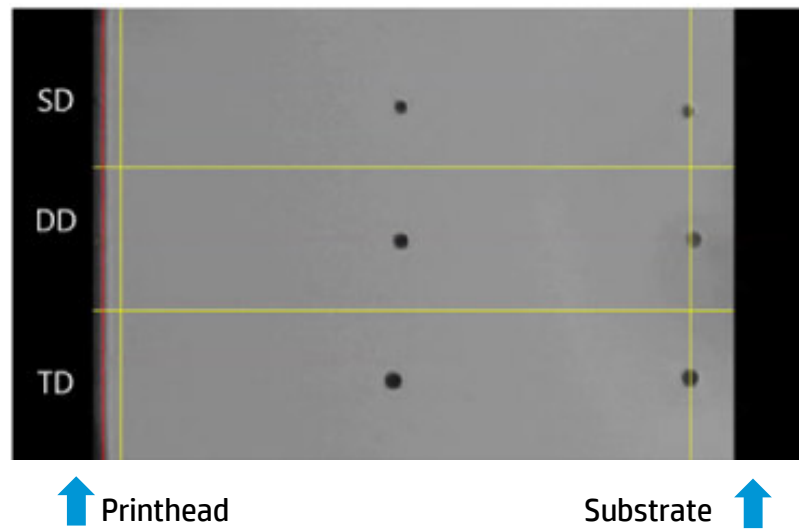
- Packaging company, 300M Euro multinational
- Utilizes Offset, Flexo, Screen, and high-end Digital
- Opened Digital Print facility around the HP Scitex FB7500 for FSDU and short run packaging



# Introducing HP Thermal Ink Technology

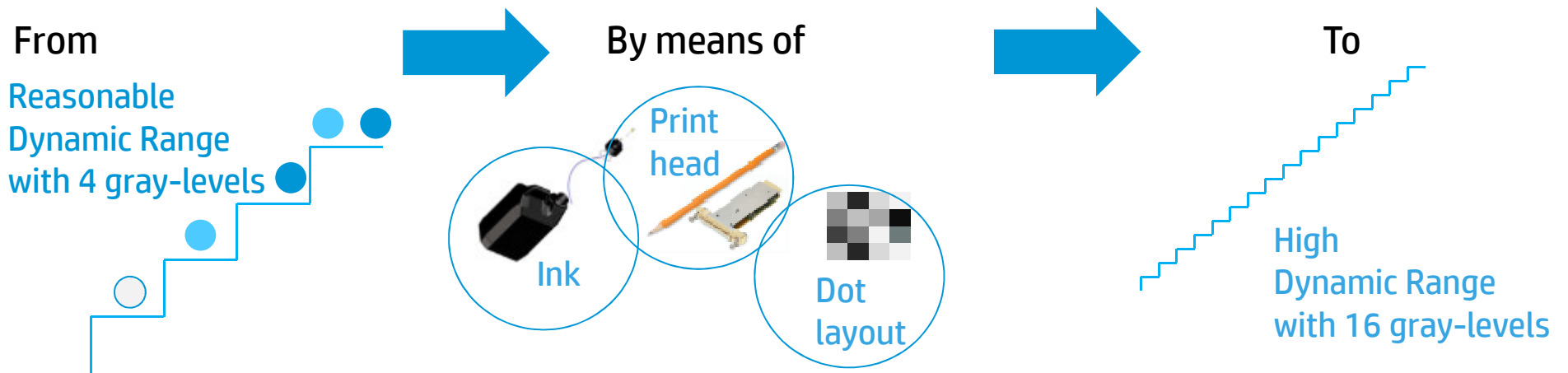


# HDR – The right dot to the right spot



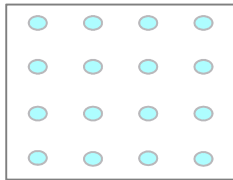
**All drops fired simultaneously hit the sheet at the same time**

# Introducing HP HDR [High Dynamic Range] Technology

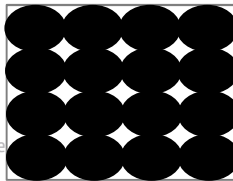


## Quality and Productivity at the same time

- low drop volume
- light & dark inks
- + low image grain
- + fine color control



- high drop volume
- + good for saturated colors
- + high ink flux/ nozzle good for high productivity



# Introducing the HP Scitex FB10000 Industrial Press

The art of no compromise



## Powered by HP Scitex High Dynamic Range Technology

Multiple drop volumes produce halftone dots

- 4-level drops (0, 15, 30, 45 pl) at 24 kHz
- Dynamic Grayscale printing at full press speed up to 625m<sup>2</sup>
- Up to 160x320cm plates, 2,5cm thickness



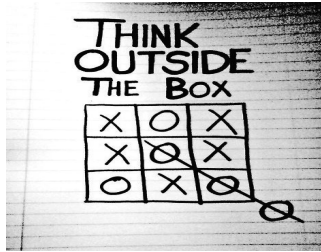


## **2. Business consulting with HP Advantage**

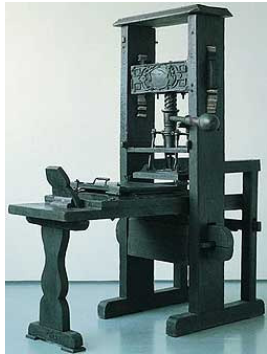




# Are you ready to... innovate?



From just Printing→



use Innovation Workshop→



to a new business model



# HP Advantage Program

it's always awe inspiring to me to see common things done in an uncommon way.  
Low investment, +10% in a palette, less waste....more profit




with **incrémental** Innovations

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# HP Adventage introducing Innovation Platforms: P&G, Bosch


Beauty & Grooming
Household Care
Commercial & Business
Print all Innovations




**Ariel Pods**  
Added 24 Apr 2013  
Ariel PODS new three-chamber liquid unit dose pod builds on Ariel's heritage of delivering superior cleaning with breakthrough technology and expands on the successful launch of Tide PODS technology in the U.S.  
[Download Ariel Pods Factsheet \(PDF, 415.7KB\)](#)




**Febreze Stick & Refresh**  
Added 24 Jan 2013  
Febreze Stick&Refresh is the only product of its kind, with innovative technology that slowly releases scented oils without the use of plugs or batteries to eliminate odors and provide long-lasting freshness.  
[Download Febreze Stick & Refresh Factsheet \(PDF, 430.9KB\)](#)




**Cascade Platinum**  
Added 24 Jan 2013  
Cascade Platinum achieves a clean so powerful it helps keep the dishwasher sparkling while delivering a variety of dish care benefits.  
[Download Cascade Platinum Factsheet \(PDF, 493.0KB\)](#)




**Bounty Dura Towel**  
Added 24 Jan 2013  
Bounty DuraTowel is designed with more fibers that hold together even when wet and cleans like a cloth to tackle the toughest projects.  
[Download Bounty Dura Towel Factsheet \(PDF, 411.2KB\)](#)




**Prilosec Wildberry**  
Added 31 Oct 2012  
Prilosec OTC Wildberry is the first flavor-coated, 24-hour pill for the treatment of frequent heartburn.  
[Download Prilosec Wildberry](#)



**Vicks Ceemea Hero**  
Added 18 Sep 2012  
For the first time, Procter & Gamble is expanding Personal Health Care into Russia, Poland, Czech Republic and Hungary.



**Swiffer WetJet Extra Power Pad**  
Added 27 Aug 2012  
The new Swiffer WetJet Extra Power Pad with the scrubbing power of Mr. Clean Magic Eraser



**Vicks ZzzQuil**  
Added 13 Jul 2012  
Vicks ZzzQuil is a non-habit forming sleep-aid from the makers of Vicks NyQuil that helps provide a good night's sleep.



# Print Business in Transition

## What We've Been (then)

“Doers” of jobs that are finished and done with.



## What We're Becoming (now?)

“Managers” of projects that are ongoing and deliver **online value** information's

The image shows a screenshot of a business directory listing for 'Tapas 177 Lounge'. The listing includes the address '177 Saint Paul Street, Rochester, NY', phone number '(585) 262-2090', and website 'tapas177.com'. It also shows a category 'Restaurant' and a rating of 4.1 reviews. Below the listing, there are two more listings for 'Jines Restaurant' and 'Nick Tahou Hots'. To the right of the listings, there is a large black box with white text that reads 'HELPING YOUR BUSINESS GET NOTICED'.

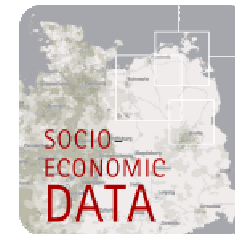


# Why you need to have an **online value**?

What is the **value** for Coca Cola to print a digital, more expensive personalised label?



- + Crazy media buzz, beat all competitors but Redbull
- +Création of the biggest social media coca cola Data base (+ 1.300.000 and growing) That will help better target futur consumer needs.



- +4 % of sales \$\$\$\$\$\$

- + one to one marketing engagement (100%).

Coca Cola « you » campaigning story

- +leverage of digital VDP technology.



# Customer engagement thanks to social platforms

100% against 28% to Pepsi  
on FB X2 compare to Pepsi.



## starcount Mashable Social Brand Chart THE SOFT DRINK BRAND TOP 10 - 10/12/12 to 10/19/12

RANK	BRAND	AGGREGATED NET INCREASES THIS WEEK	ENGAGEMENT INDEX
1	Red Bull	75,245,415 views, 40,450 followers, 285,893 fans, 18,373 fans	76%
2	Coca-Cola	1,313,478 views, 5,129 followers, 2,511 fans, 34 fans, 402,689 fans, 3,678 fans, 975 fans, 9 fans	100%
3	Pepsi	1,153,996 views, 3,239 followers, 321 views, 236,304 fans, 2,891 fans	28%
4	Monster Energy	333,727 views, 6,551 followers, 132,358 fans	27%
5	Dr Pepper	6,463 views, 479 followers, 106,780 fans, 12 fans	19%
6	Sprite	38,120 views, 36 followers, 94,313 fans, 21,333 fans, 74 fans	4%
7	Guarana Antarctica	10,907 views, 287 followers, 182,022 fans	18%
8	Gatorade	49,514 views, 1,388 followers, 53,708 fans, 8 fans, 47,398 fans	4%
9	Mountain Dew	18,675 views, 1,616 followers, 37,050 fans, 22 fans, 87 fans	6%
10	Fanta	67,339 views, 95 followers, 63,114 fans, 78 fans	3%

### THIS WEEK'S ONES TO WATCH

30	Kool-Aid	Up 154 places to No.30. Kool-Aid's Halloween campaign on Facebook proves successful this week, the drink brand gained over 5,000 likes on their posts.	
35	Lipton Iced Tea	Up 29 places to No.35. World leading ice tea brand Lipton celebrated their Facebook page passing 2 million fans at the beginning of this week.	

# The Innovation Process

## A Scalable, Repeatable and Effective Process

There are three terrific qualities of the innovation process:

**1. It is scalable to all sizes, even with customers.**

**2. The process is repeatable for any projects.**

A company can have numerous instances of the innovation process in action at all times. A team leader can launch new challenges once the ideas from old challenges have been implemented (or even sooner in some instances).

**3. It is not expensive: needs only 4 hours per month with 5 people**



# See you



at next **HP Advantage workshops** in Budapest, Berlin... starting again March 2014

or at **Interpack** in Duesseldorf, 8-14. May 2014

or at **FESPA Digital** in Munich, 20-23. May 2014



# Interpack 2014

1. 165k visitors (2011)
2. Packaging experts from within Brand Owners
  - Packaging Innovators
  - Packaging Procurement / management
  - Packaging Specialists (i.e. POS, Merchandizing)
3. Print Converters
  - Company Owners
  - Production Managers
  - Press Operators (specialized by application)
4. Packaging designers and Agency community
5. Influencers (Press, Industry commentators)
6. Others (students, etc.)

## HP @ hall 13



- Packaging materials, means and production
- Processes and machinery for packaging
- Processes and machinery confectionary and bakery



# FESPA 2014

- FESPA Digital is the largest, most comprehensive and international digital wide format print exhibition
- Featuring more than 400 global exhibitors, with a phenomenal range of products and services, covering product launches and solutions for wide format digital printing, textile printing, garment decoration, screen printing, signage and digital signage; application, finishing, software, hardware, machinery, substrates, inks, business management and morePDF menu with
- Incorporating FESPA Fabric and co-located with ESE 2014
- Organizers are expecting 15,000 visitors

**HP @ hall B2**



**Many Thanks!**

**Any Questions?**

