



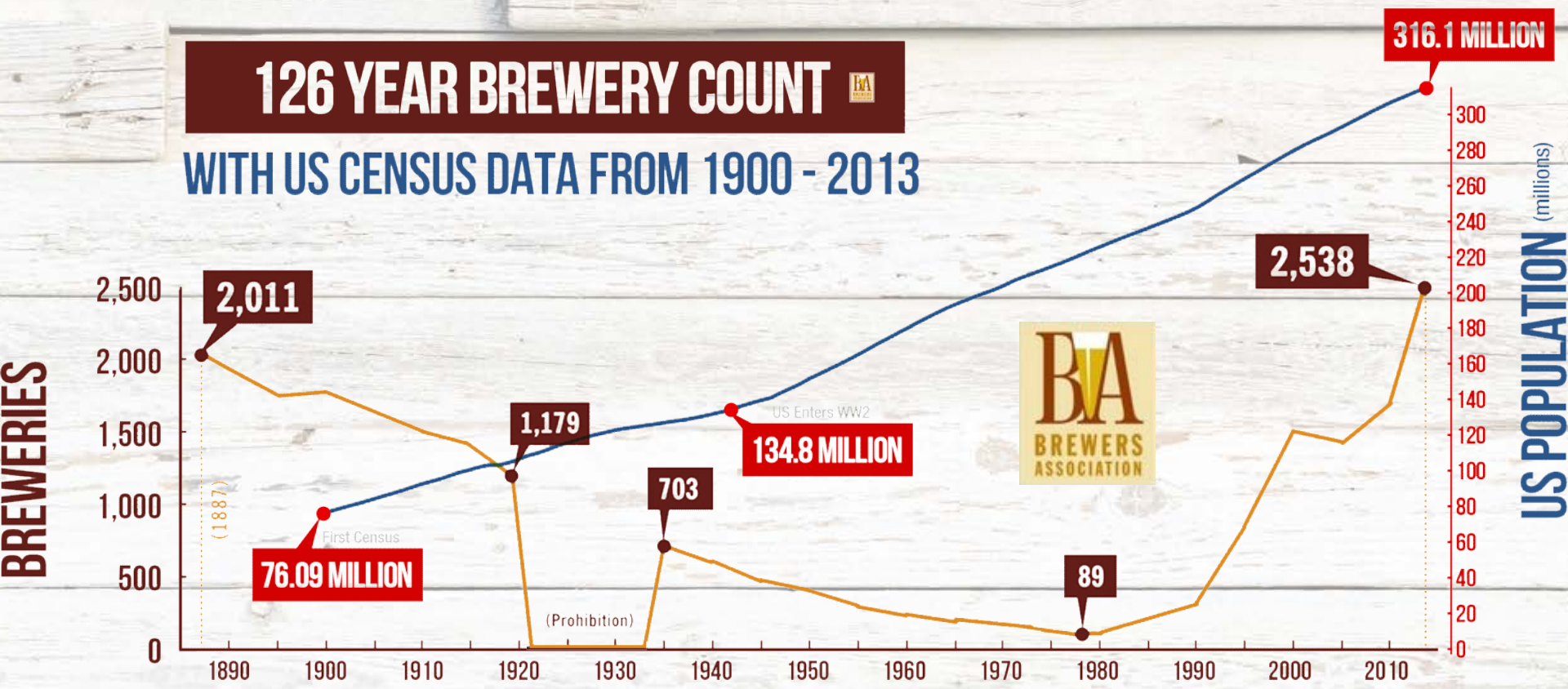
**The rise of craft drinks**

**some challenges ...**

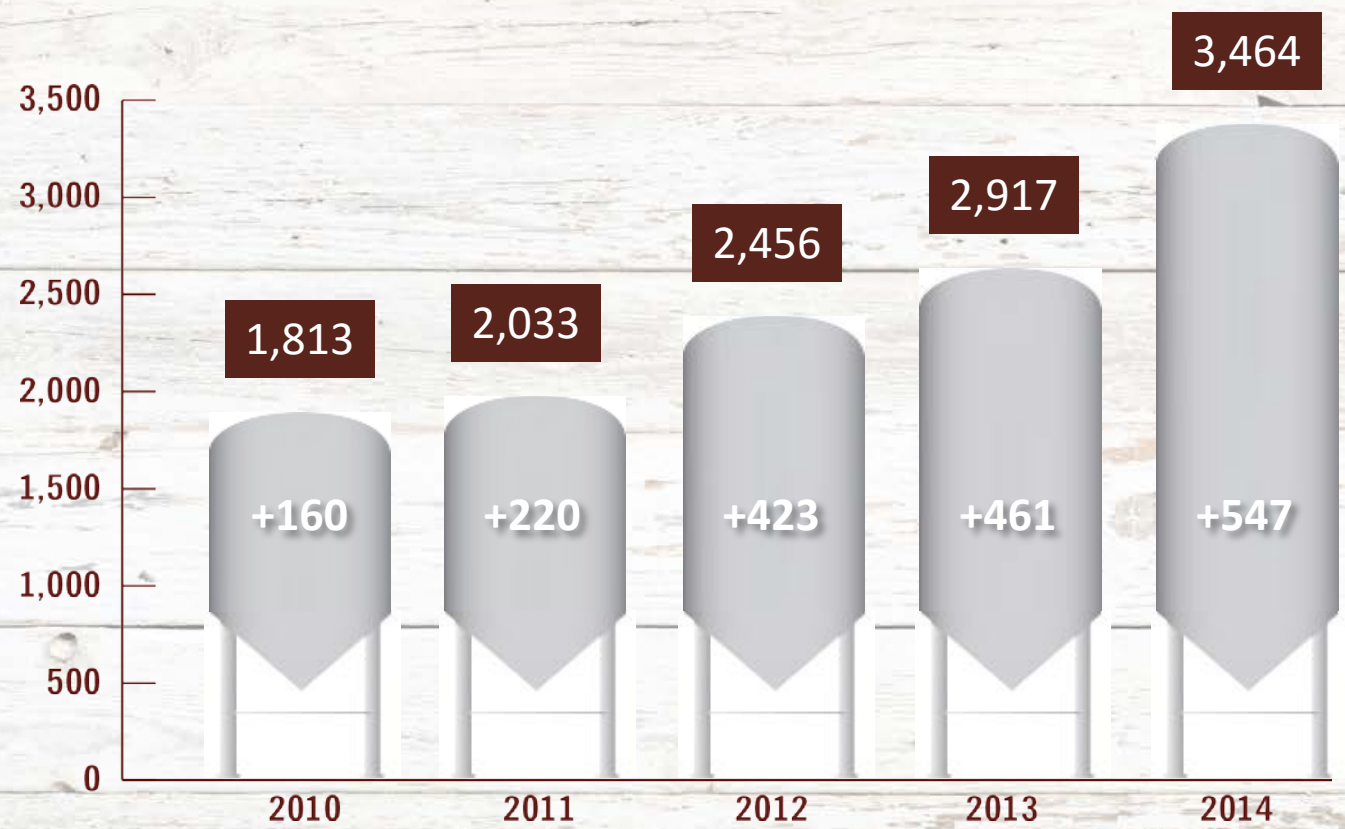
**massive opportunities**

# CRAFT BEER

# Craft Beer Growth

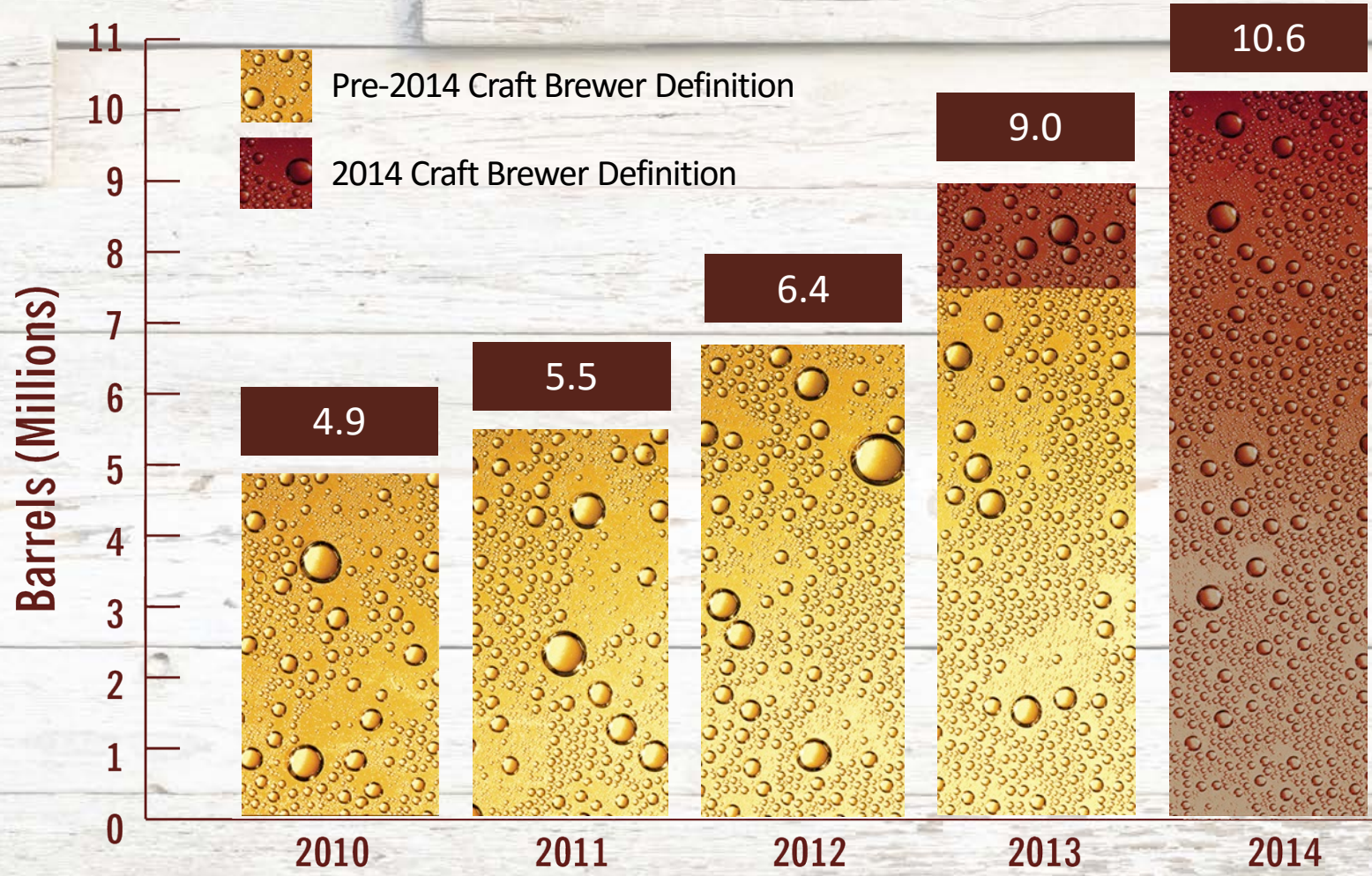


# Brewery count

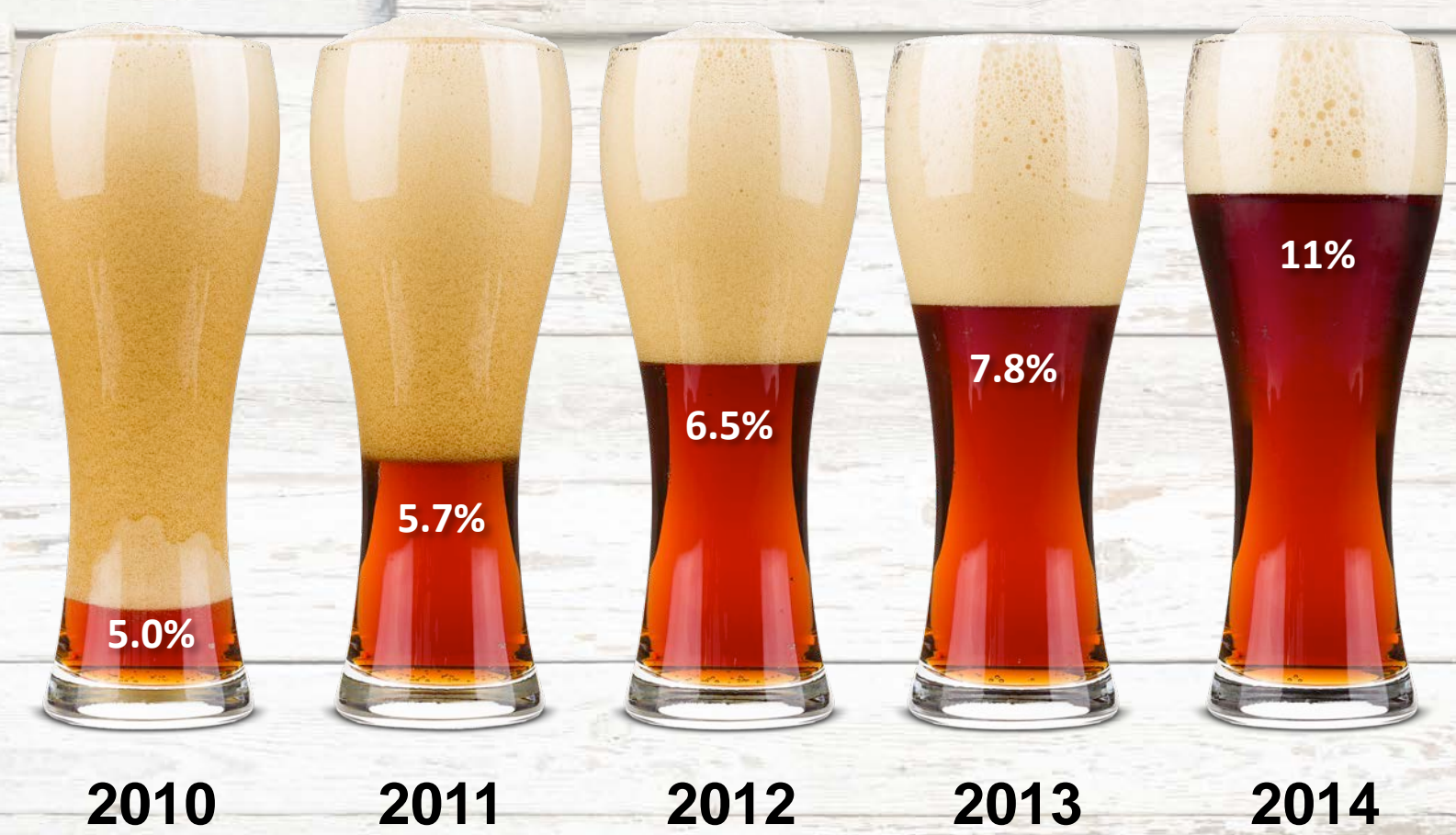




# Production volumes



# Craft brewers market share



# U.S. BEER SALES VOLUME GROWTH 2014

**OVERALL  
BEER**

**0.5%**

197,124,407 bbls

**17.6%**  
**CRAFT**

21,775,905 bbls

**IMPORT  
BEER**

**6.9%**

29,430,185 bbls

**36%**

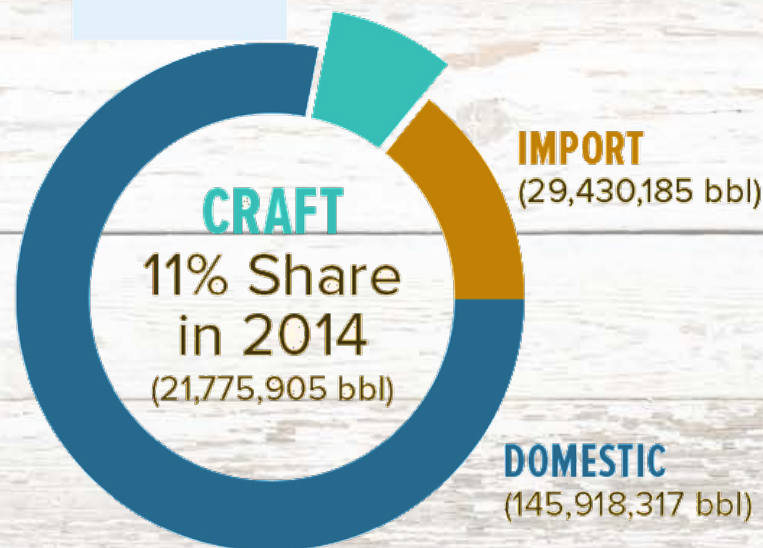
**EXPORT  
CRAFT  
BEER**

383,422 bbls

**OVERALL BEER MARKET  
\$101.5 BILLION**

**CRAFT BEER MARKET  
\$19.6 BILLION**

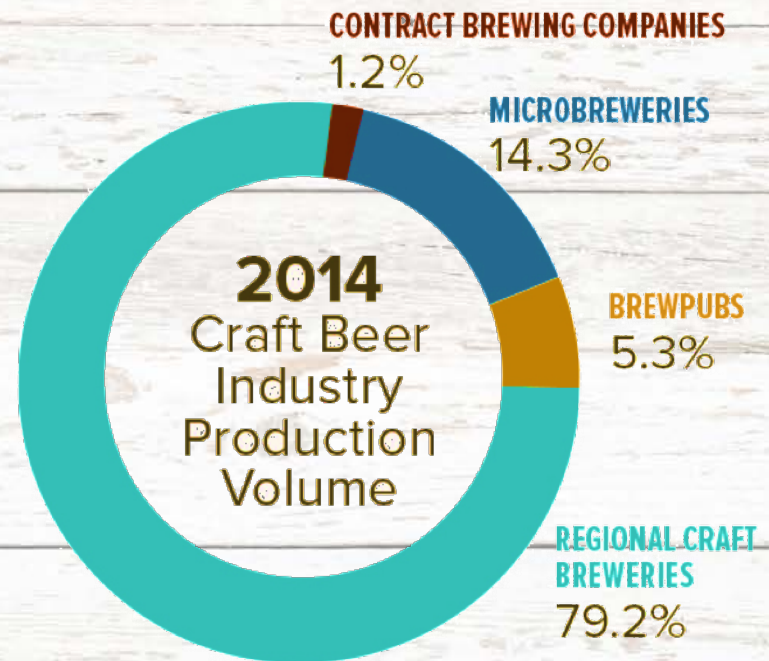
22% DOLLAR SALES GROWTH



## U.S. BEER PRODUCTION VOLUME 2014

**18%**  
**CRAFT**

**OVERALL  
BEER**  
**0.5%**



Source: Brewers Association, Boulder, CO

## Craft Beer SKU's

- On average, 3 microbreweries open every 2 days in the US
- There are approximately 30,000 SKUs of craft beer in the US
- Year-on-year volume growth is expected to be 15.0%
- Demand is continuing to grow for craft beer brands in the US
- Although no precise figures, definitely a move towards cans

## 1962 canned beers, 512 breweries



# CRAFT

## DRINKS

Craft beer is growing rapidly  
UK & US moving to cans



# What is holding back the growth of craft drink cans ?

- **Minimum order quantities from the can suppliers**
- **Responsiveness to low volume, batch production**
- **High cost of using shrink labels on cans**
- **Responsiveness to demand based variations**

## Digital printing can offer a solution to these issues ... and more

### Production

- A better cost per can
- Just in time inventory
- No minimum volumes
- Quick turnaround

### Marketing

- Brand reshaping & refining
- Rapid response to market trends
- Event customization
- Sales promotions
- Market customization
- Same product for different markets

**Ultimately its about flexibility!**

## One product – many images



Limited edition

sports, music, seasonal events



## Events

movies, product launches



Man of steel

# Localised, regionalised and time related



**Local store  
promotions**

**Special limited pricing  
printed  
onto products**

**Different images  
for inner and outer city  
stores**

**Different images  
depending on  
weather conditions**



jet

## **In summary, craft drinks will continue to grow!**

- **Craft Beer is growing in the US and Europe, with the US rapidly adopting cans**
- **Cider, soft drinks, mixers and spirits are following the same trend, along with other complementary products**
- **The result will be a large number of small run products**
- **The craft drinks companies can already manage the filling and distribution, the printing is the issue**

# Tonejet key features



# Tonejet key features

## cost effective super-thin ink layer

- similar cost to conventional printing inks
- combined with a printed ink layer of less than 0.5  $\mu\text{m}$
- resulting in maximum running cost efficiency

## ink compatibility

- super thin printed ink layer
- providing flexibility for post-print converting
- pigmented ink formulation safe for primary and secondary packaging applications

## substrate independence

- non-contact, drop-on-demand deposition
- enables high-quality print on virtually any type of substrate
- does not need a pre-coat

## continuous drop size variation

- ability to deposit concentrated pigmented inks at high speed
- varying the droplet volume continuously, without impacting on print speed, resulting in *high image quality*

## nozzle-less reliability

- unique nozzle-less printheads able to achieve exceptional reliability
- ultrasonic maintenance technology



**WE INVITE YOU  
TO EXPERIENCE**

