ASEAN PRINTING FORUM (ONLINE) MALAYSIA 2020

30.10.2020 (FRI)
9:30am - 2:00pm LIVE

"The New Normal"

Leading Through Change. Digital Transformation

COUNTRY REPORT PRESENTATION

THAILAND · SINGAPORE · INDONESIA · PHILIPPINES · LAOS

MYANMAR · CAMBODIA · VIETNAM · BRUNEI · MALAYSIA

Organized by

吉隆坡暨雪蘭莪中華印務商公會
The Selangor & Federal Territory Chinese Printing Presses' Association
MALAYSIA

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TUAN NGO
Vice Chairman
VIETNAM PRINTING ASSOCIATION

Printing Industry's Trend - "THE NEW NORMAL"
Leading Through Change : Digital Transformation

Color confidence and quality assurance
A never-ending task in print production

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AGENDA

Introduction

- Vietnam economic forecast – 2020-2021 outlook
- Vietnam's macro-economic & GDP growth
- Global economic integration
- Vietnam's foreign direct investment (FDI)
- Tremendous impact from COVID-19

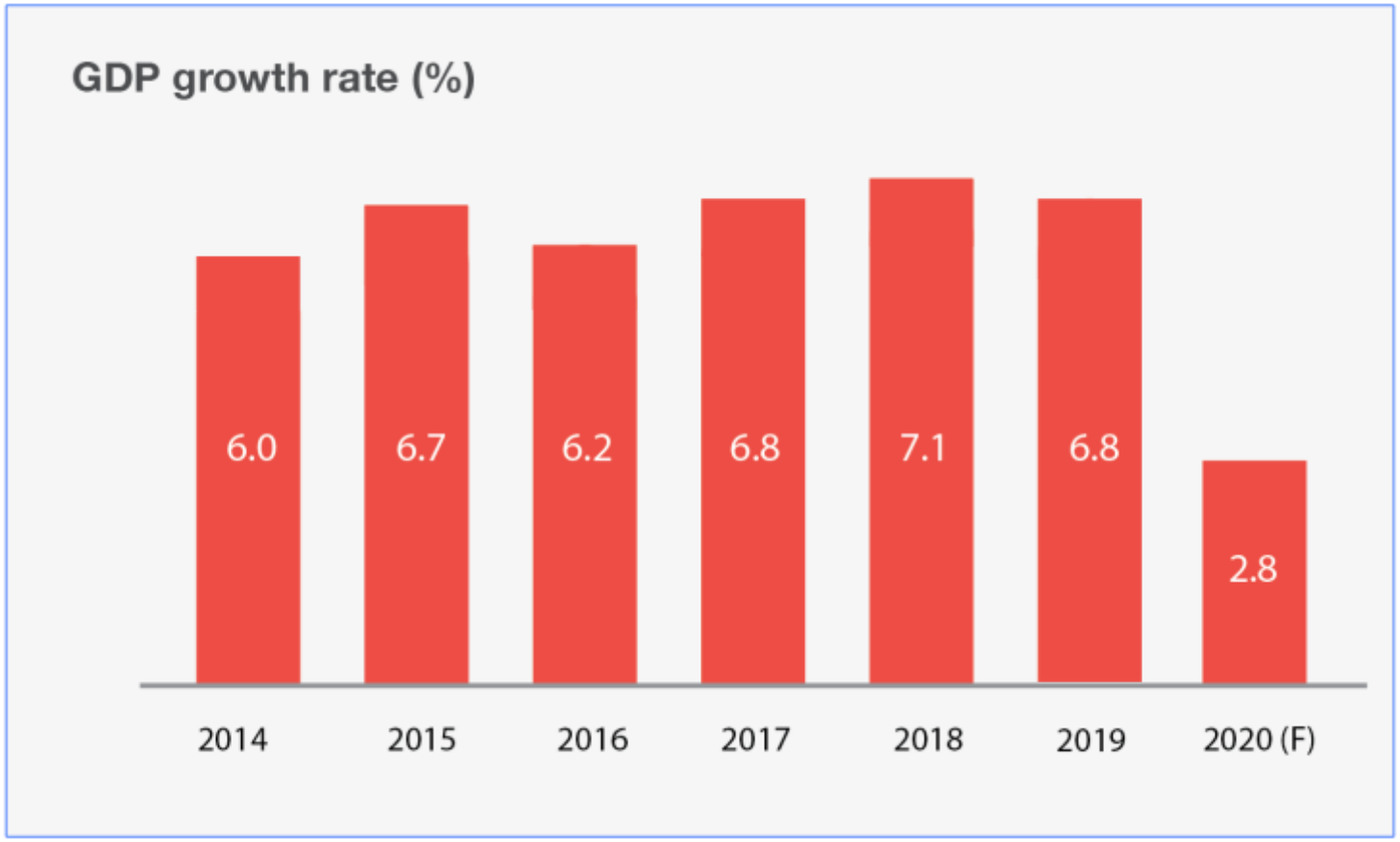
Digital transformation: Color confidence and quality assurance - A never-ending task in print production

- Ongoing trends in the global printing market
- Hallmarks of our industry in new normal
- Digital printing trends
- Sheetfed trends
- Quality Inspection – Color confident & quality assurance
- Opportunities and challenges

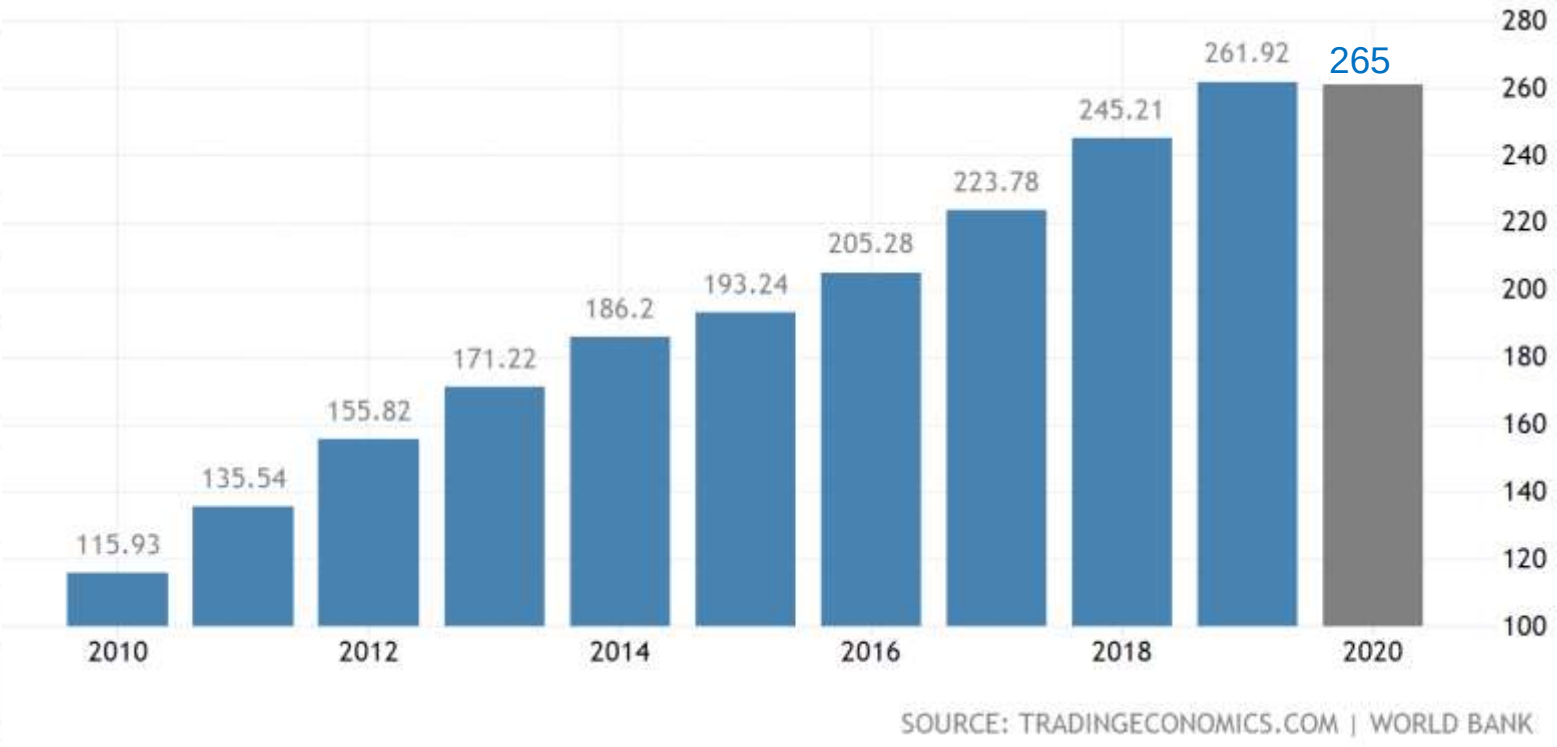
VIETNAM - ECONOMIC FORECASTS

Overview	Actual	Q4	Q1	Q2	Q3	2021
GDP Annual Growth Rate (%)	2.62	4.4	6.5	8.5	4.5	6.5
Unemployment Rate (%)	2.73	3.2	3.5	3.3	3.1	3.2
Inflation Rate (%)	2.98	2.2	2.5	3.5	3.7	4
Interest Rate (%)	4.00	4	4	4	4	4.25
Balance of Trade (USD Billion)	3.50	1600	1600	1	2.1	1600
Current Account (USD Million)	-323.00	2300	2700	2500	2650	2730
Current Account to GDP (%)	5.00	-0.5	1	1	1	1
Government Debt to GDP (%)	57.50	62	67	67	67	67
Government Budget (% of GDP)	-4.40	-7.5	-7	-7	-7	-7
Manufacturing PMI (points)	52.20	47	50	51	52	51
Corporate Tax Rate (%)	20.00	20	17	17	17	17
Personal Income Tax Rate (%)	35.00	35	35	35	35	35

VIETNAM'S MACRO ECONOMIC & GDP GROWTH



VIETNAM'S MACRO ECONOMIC & GDP GROWTH



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GLOBAL ECONOMIC INTEGRATION

10 Signed & Effective

- AFTA
- ASEAN - China
- ASEAN - Korea
- ASEAN - India
- ASEAN - Japan
- ASEAN – Australia/New Zealand
- Vietnam - Chile
- Vietnam - Japan
- Vietnam - Korea
- Vietnam – Eurasian Economic Union

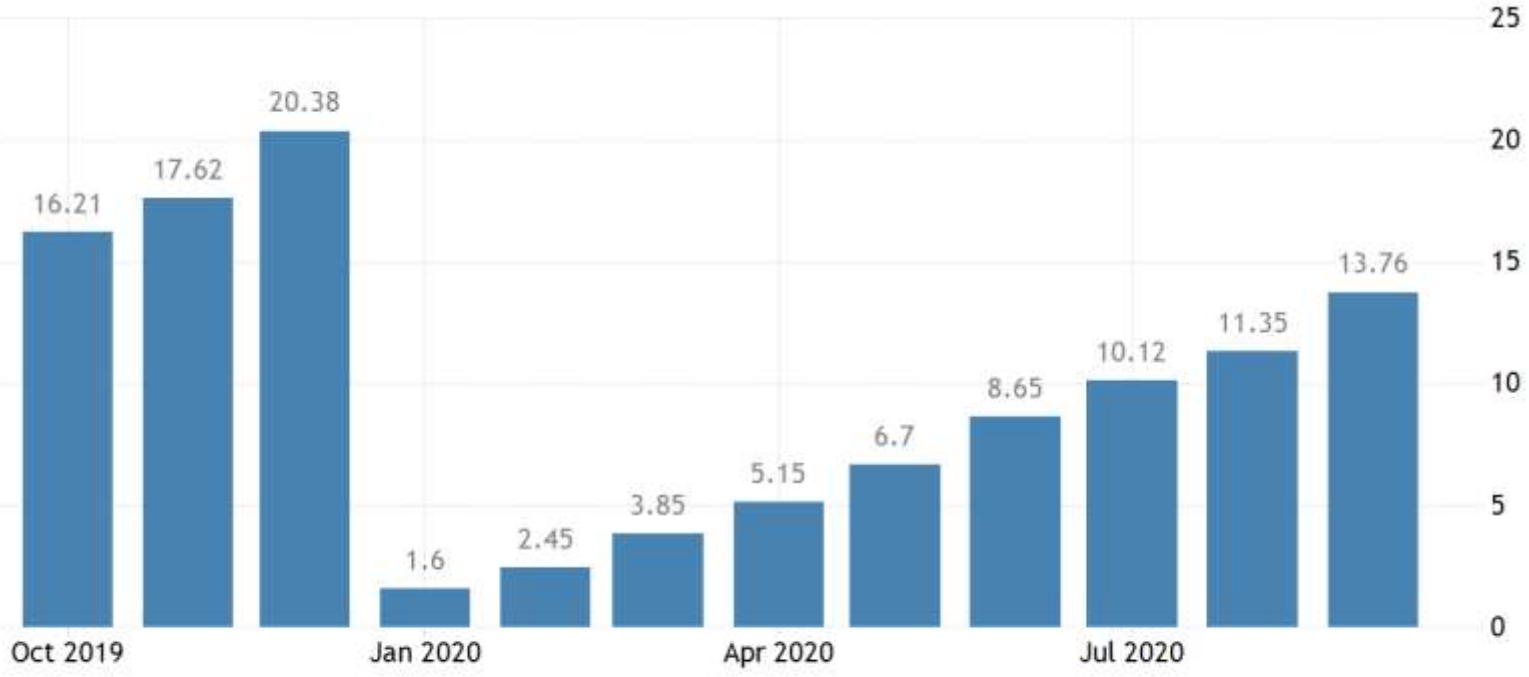
3 End of negotiation

- **CPTPP**
- **ASEAN – Hong Kong**
- **EVFTA**

3 Under negotiation

- Vietnam - EFTA
- RCEP
- Vietnam - Israel

VIETNAM'S FOREIGN DIRECT INVESTMENT



SOURCE: TRADINGECONOMICS.COM | MINISTRY OF PLANNING AND INVESTMENT, VIETNAM

TREMENDOUS IMPACT FROM COVID-19

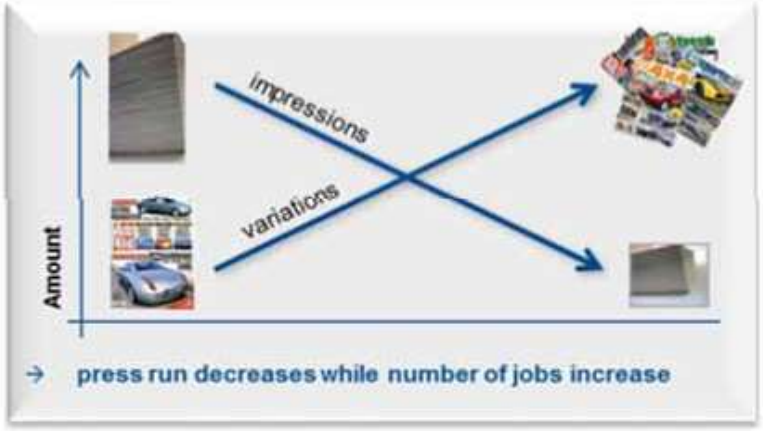
- The deduction of the entire printing industry is more than 10%.
- The volume of printed books, except for textbooks, declined significantly.
- Newspapers and magazines fell sharply.
- Label and packaging sectors were indirectly affected by various types.
- Many new investment projects have been put on hold.
- Some small businesses either went bankrupt or are trying to exit.
- Workers' income has been decreased due to lack of work.
- Our government has the policy to support the business.

DEVELOPMENT OF THE PRINT INDUSTRY IN VIETNAM

- Until 1995, communication in print production was entirely walk, talk, and paper

- 1998: the Printing industry starting to grow, private companies entered the market
- 2010: Booming with state of the art equipment & FDI
- 202x: Full integration CTP/CIP3 /JDF/MIS/ Color control

THE ONGOING TRENDS IN THE GLOBAL PRINTING MARKET



HALLMARKS OF OUR INDUSTRY IN NEW NORMAL

- Individualization or hybridization of products (linking of production and services)
- Providing additional services
- Integration of customers and partners into business processes and value chain.
- Embedded systems as well as (partly) autonomous machines
- Increasing interconnectivity

= Digitized World

DIGITAL PRINTING TRENDS

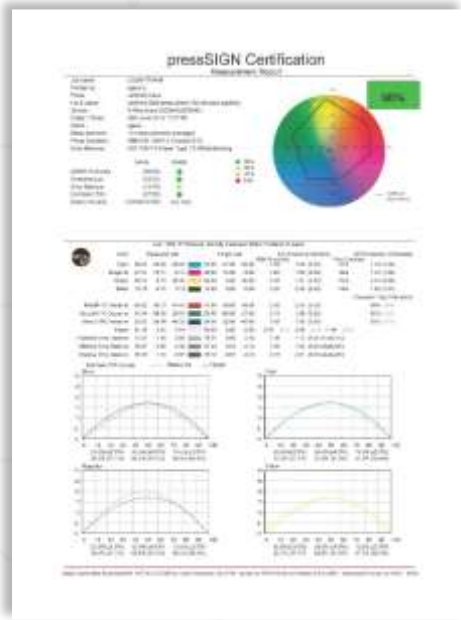
- Transition from analog to digital
- Benefits from trends for shorter runs and faster turnaround
- Capability of totally variable print also helps boost demand for commercial products.
- Low investment cost for the newcomer
- Toner based A3 Press dominated the landscape
- Using off-the-shelf materials with inline primer
- VDP and special effects
- High volume and high quality in packaging/label printing with HP Indigo .

SHEETFED TRENDS

- Still the dominant process but under pressure from digital
- Increased efficiencies of new technologies helping to reduce unit prices
- Standardization is becoming important for the leading packaging suppliers
- Steady growth in the use of UV inks and varnishes

QUALITY INSPECTION

- *MeasureColor and PressSign report:* good overviews, lots of numbers, interpretation by reader necessary (e.g. color assignment on the printing sheet)
- Conversation with printers/bookbinders about material and processing properties (e.g. coating in printing/folding) and other soft factors (experience of employees)
- Experienced + motivated personnel: mistakes will always be made – by people, but the best thing we can do is recognize them and prevent them
- CIP (continuous improvement process) at interdepartmental discussion platform



OPPORTUNITIES AND CHALLENGES

Relevance for all of us and for our customers.

Level of Service

Cost

On-time rate

Quality

Partnership

Issue resolution

Transparency

Communication

Sustainability & Social Responsibility

HIGG

FSC cert. & paper

Social Responsibility

CONCLUSION

Digital transformation

Color confidence and quality assurance

A never-ending task in print production

“There is nothing permanent except change.”

- Heraclitus of Ephesus-

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