



POWER OF PRINT ANALYST DAY 2018

AGENDA

Thursday Morning, November 1

8:25 – 8:30 AM	OPENING REMARKS	Vanessa Yanez, Head of Print Communications
8:30 – 9:05 AM	WELCOME / PRINT STRATEGY OVERVIEW	Enrique Lores, President of HP Imaging and Printing
9:05 – 9:50 AM	HOME PRINT SOLUTIONS	Anneliese Olson, Global Head and GM, Home Printing Solutions
9:50 – 10:00 AM	BREAK	
10:00 – 10:45 AM	OFFICE PRINT SOLUTIONS	Tuan Tran, Global Head and GM, Office Printing Solutions
10:45 – 11:30 AM	GRAPHICS SOLUTIONS	Santi Morera, Global Head and GM, Graphics Solutions Business
11:30 – 12:00 PM	LEADERSHIP PANEL Q&A	Enrique, Anneliese, Tuan, Santi
12:00 – 1:00 PM	LUNCH BREAK	





WELCOME

ENRIQUE LORES | PRESIDENT, IMAGING & PRINTING



POWER OF PRINT

A person is holding a large, vibrant printed photograph of a red sports car. In the foreground, a black HP printer is visible, with a printed page emerging from its output tray. The background shows a blurred office or home setting with a whiteboard and a wooden desk.

REINVENTING PRINT

STRATEGY BASED ON INNOVATION

GREAT PROGRESS

SHAPING THE BUSINESS

STRATEGY BASED ON INNOVATION

CORE

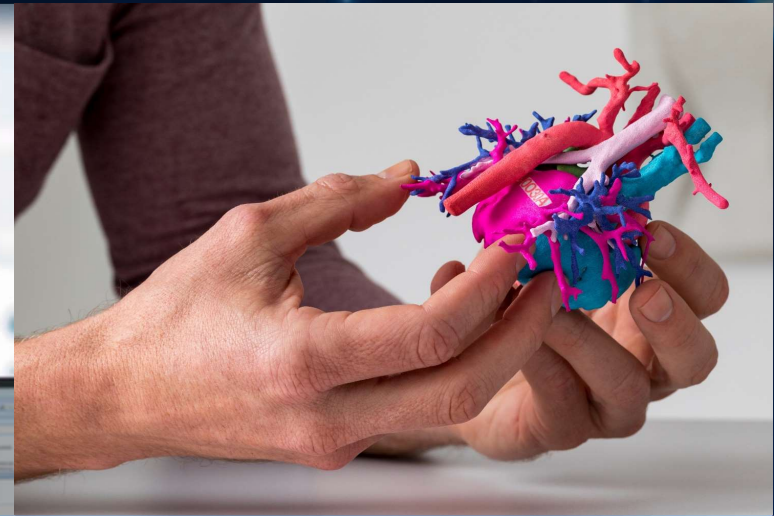
- Reignite the home
- Grow profitable office share

GROWTH

- Disrupt contractual copier business
- Transform graphics industries

FUTURE

- Lead 3D printing



BRAND & GTM



IP & TECHNOLOGY



BIG DATA



SCALE & COST

3D Printing image – courtesy of Phoenix Children’s Hospital; Heart of Jemma

DELIVERED ON OUR COMMITMENTS

	REVENUE ¹	OPERATING PROFIT ¹	UNIT ¹	SUPPLIES(CC) ^{1,2}
^{Y/Y} GROWTH ^{1,2}				
FY2018 YTD	▲ +12%	▲ +6%	▲ 13%	▲ +7%
FY2015	▼ -9%	▼ -10%	▼ -8%	▼ -4%

1. FY18 includes the impact of acquisition of Samsung's Printing business

2. CC = Constant Currency; adjusted to exclude the effect of foreign currency exchange fluctuations calculated by translating current period revenues using monthly average exchange rates from the comparative period and excluding any hedging impact recognized in the current period

PROGRESS IN STRATEGIC AREAS

HOME / INSTANT INK

>20%

Adoption Rate
in FY18¹

>30%

Y/Y Growth in Enrollees
in FY18²

OFFICE / MPS

9%, +2pts

A3 Unit Share and
Growth Y/Y CQ2'18³



SAMSUNG
Printing

GRAPHICS

>10%

Page Growth Y/Y⁴

10

C500 Press Customer
Contracts

1. Full year estimate based on participating retailers in U.S., U.K., France, Germany and Spain

2. Full year estimate

3. Based on CQ2'18 IDC Market Share data

4. Indigo and PWP (FQ1-Q3'18 Y/Y)

TRENDS DRIVING PRINT

ONE LIFE

SMART

SECURE

SUSTAINABILITY

AS-A-SERVICE

PERSONALIZATION



THE POWER OF PRINT

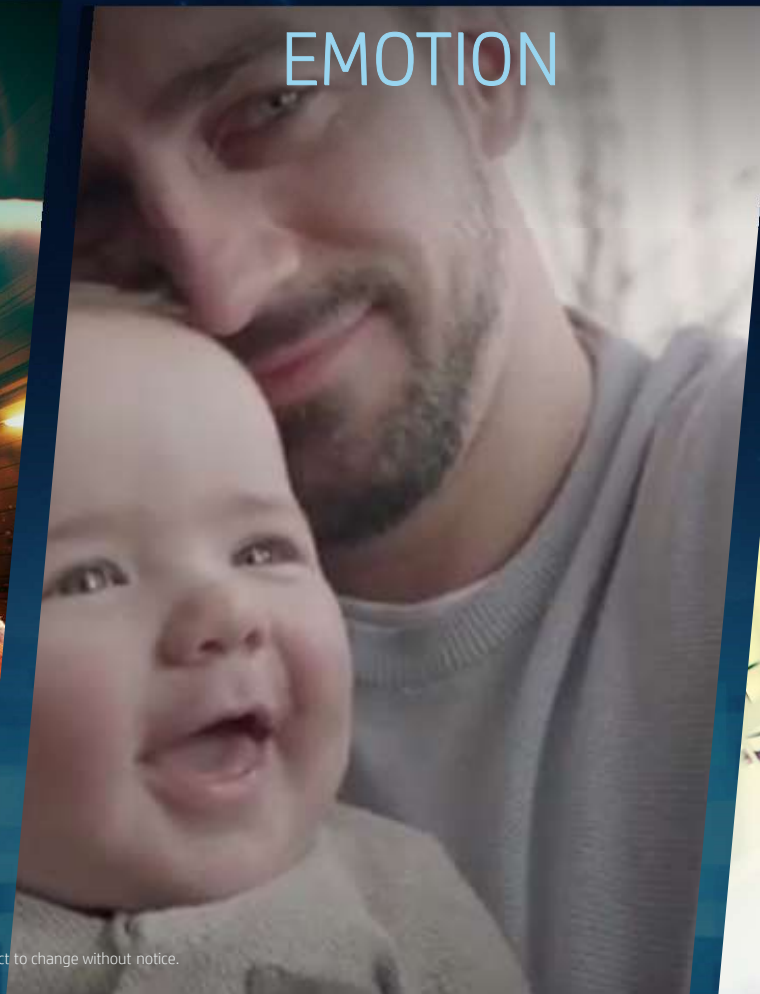
VIDEO #1
Print Sizzle Reel

HOW WE EXECUTE

INNOVATION

EMOTION

RIGOR



PRINTING-AS-A-SERVICE EXPANDING ACROSS THE PORTFOLIO

HOME

OFFICE

GRAPHICS



HOME SUBSCRIPTION

CONTRACTUAL

CLICK CHARGE MODEL

DRIVING PRINT GROWTH



WHO YOU'LL HEAR FROM TODAY

Anneliese Olson

Home Printing Solutions Briefing

Tuan Tran

Office Printing Solutions Briefing

Santi Morera

Graphics Solutions Business Briefing

Dr. Tim Weber

3D Printing Briefing



A photograph of three women standing outdoors, smiling and looking towards the right. They are wearing jackets and scarves, suggesting a cool environment. In the background, the Golden Gate Bridge is visible, partially obscured by a light mist or fog. The sky is overcast. The text 'REINVENTING HOME PRINTING' is overlaid in large, bold, yellow capital letters across the center of the image.

REINVENTING HOME PRINTING

ANNELIESE OLSON | GLOBAL HEAD & GM, HOME PRINTING SOLUTIONS

VIDEO #2
HPS Sizzle

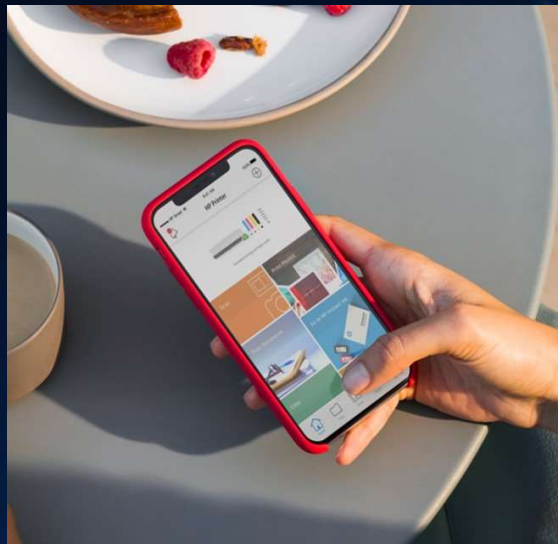
LEADING HOME PRINT REINVENTION

SERVICES



30%
YoY GROWTH

MOBILITY



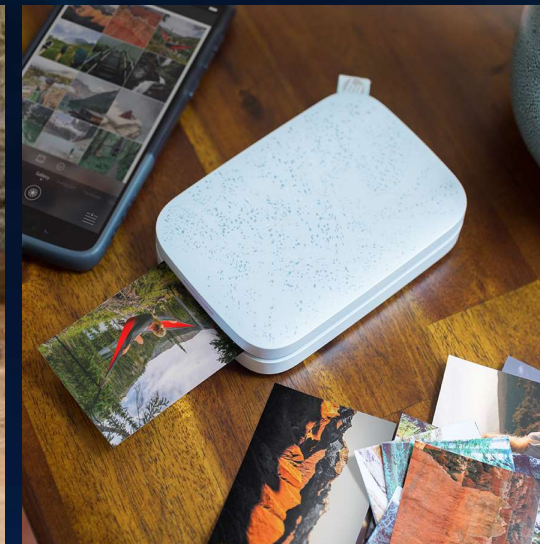
BEST MOBILE PRINT APP
FIRST SMART HOME PRINTER

RELEVANCE



WORLD'S
SMALLEST LASER

LIFESTYLE



1M CHRISTMAS DAY
> 1.5M SPROCKETS SOLD
+30M PHOTOS

REINVENTING THE HOME PRINT EXPERIENCE



**ACCELERATE
THE CORE**

DESIGN AND
EXPERIENCE



**POSITION FOR
GROWTH**

NEW CATEGORIES AND
BUSINESS MODELS



**ENABLE HOME OF
THE FUTURE**

RELEVANT
INNOVATIONS

A man with a beard, wearing a blue t-shirt, stands in a modern kitchen. He is holding a tablet computer and looking off to the side. The kitchen features white cabinetry, a stainless steel range hood, and a refrigerator. There are various kitchen items on the counter, including a pineapple, a pepper mill, and some potted plants.

MEGATRENDS

SHAPING THE FUTURE OF HOME PRINT

RAPID URBANIZATION

MEGATRENDS

SHAPING THE FUTURE OF HOME PRINT

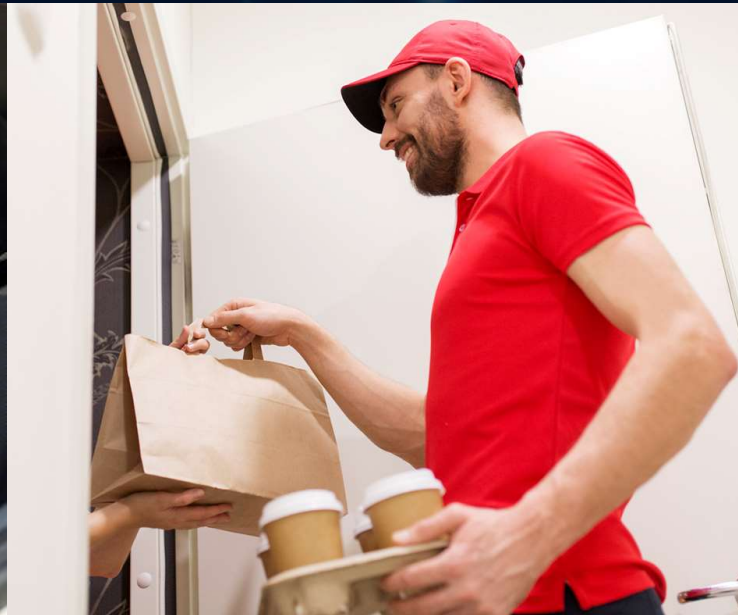
RAPID URBANIZATION

MEGATRENDS

SHAPING THE FUTURE OF HOME PRINT

GIG ECONOMY

SMARTER EVERYTHING



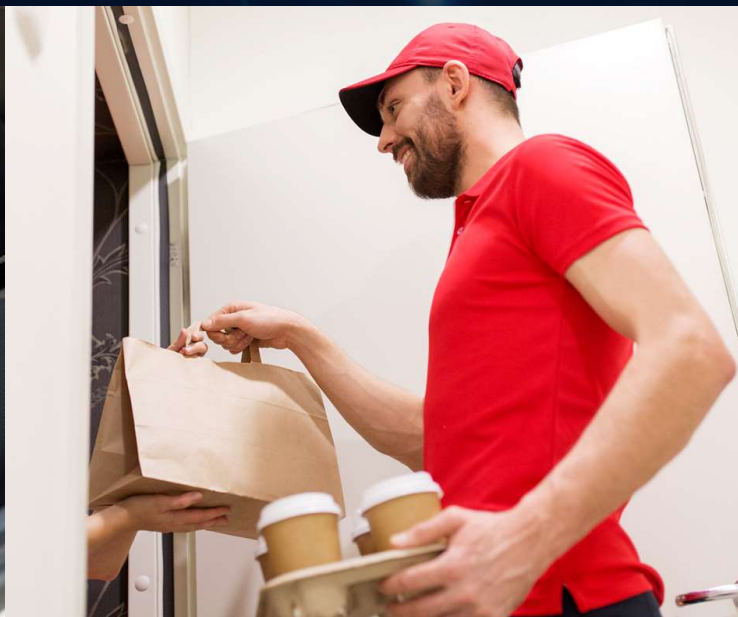
ACCELERATING INNOVATION

MEGATRENDS

SHAPING THE FUTURE OF HOME PRINT

GIG ECONOMY

SMARTER EVERYTHING



ACCELERATING INNOVATION

UNDERSTANDING

WHY PEOPLE PRINT TODAY

MANAGE



ORGANIZE – OPTIMIZE
ARCHIVE – COMMUNICATE

GROW



LEARN – TEACH
RESEARCH – REVIEW

CREATE



CAPTURE – PERSONALIZE
SHARE – IMPRESS

INNOVATING

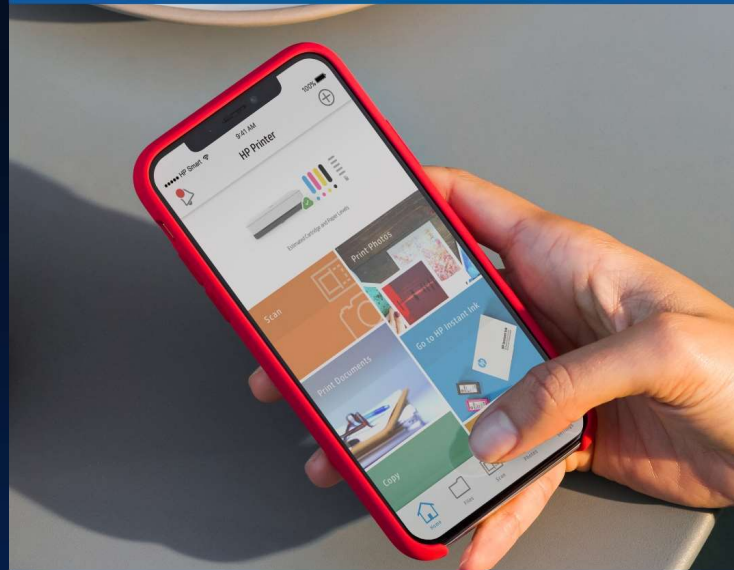
FOR HOW CUSTOMERS LIVE AND WORK

DESIGN



FITS INTO YOUR PATH OF LIFE

EXPERIENCE



RELEVANT TO YOU

SIMPLICITY



WORKS FOR YOU

INNOVATING

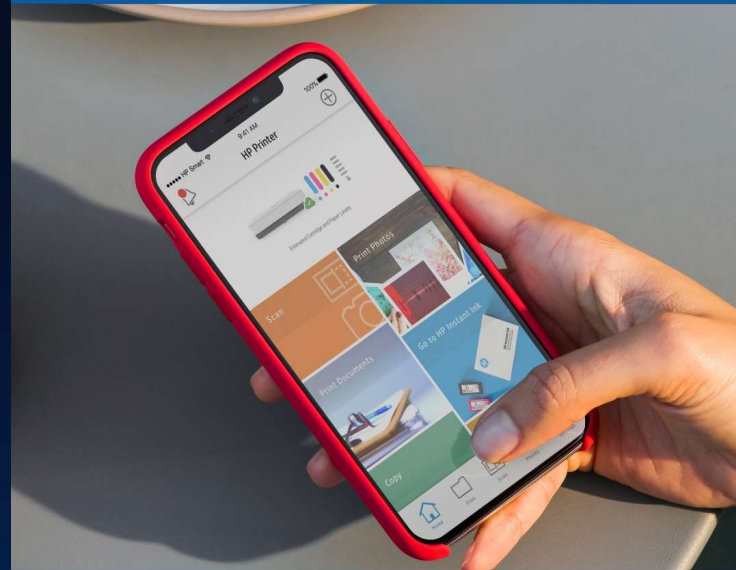
FOR HOW CUSTOMERS LIVE AND WORK

DESIGN



FITS INTO YOUR PATH OF LIFE

EXPERIENCE



RELEVANT TO YOU

SIMPLICITY



WORKS FOR YOU

DESIGN

FITTING INTO *WHERE YOU LIVE AND WORK*



A man in a grey sweater is sitting at a wooden desk with a glass top, looking at a smartphone. On the desk is a laptop, papers, and a bowl of snacks. The room has large arched windows, a potted plant, a bookshelf, and a patterned rug.

DESIGN

FITTING INTO *HOW YOU LIVE AND WORK*

EXPERIENCE

MAKING IT EASIER TO PRINT



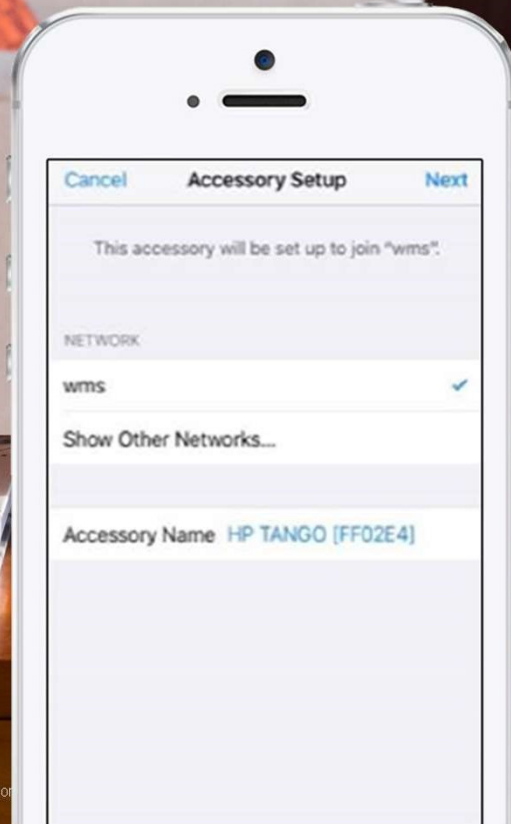
EXPERIENCE

NEW PHYSICAL AND DIGITAL INTERSECTIONS



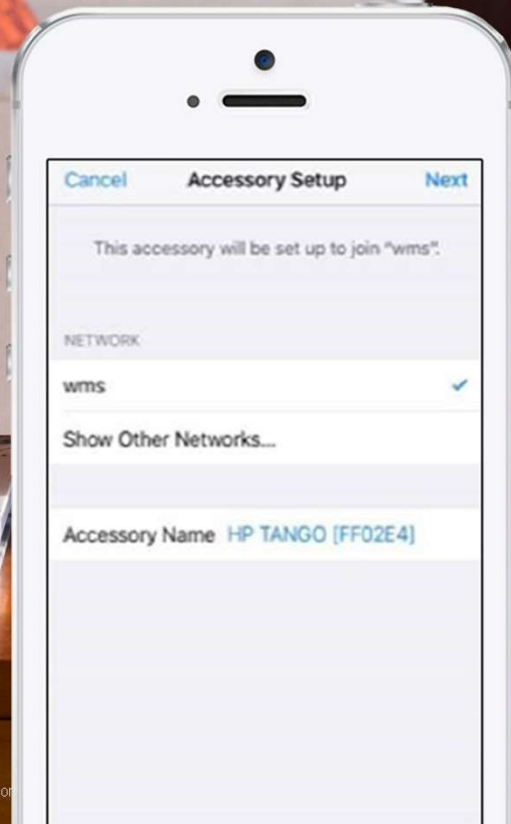
SIMPLICITY

ENABLING A SEAMLESS JOURNEY



SIMPLICITY

ENABLING A SEAMLESS JOURNEY



SIMPLICITY

DELIVERING INK TO YOUR DOORSTEP



SIMPLICITY

DELIVERING INK TO YOUR DOORSTEP



HP TANGO

THE SMART HOME PRINTER

DESIGN,
EXPERIENCE,
SIMPLICITY
BROUGHT TO LIFE

“Compact...stylish...
automatically orders ink
when it runs low...
could it do anything else?”

- *Today Show*

“This really is an
inkjet printer to get
excited about.”

- *CNET*

“Our first Editors’ Choice in
a budding category: the
smart home printer.”

- *PC Magazine*

“I am legit excited about this printer.
Finally, something that works
perfect for my tiny apartment.”

- *CNET*

“The smart, stylish
printer for millennials.”

- *SlashGear*

LIFE STAGE INSIGHTS

MEETING CONSUMERS WHERE THEY ARE ON THE DIGITAL JOURNEY



VIDEO #3
Ready for Today

LIFE STAGE INSIGHTS

MEETING CONSUMERS WHERE THEY ARE ON THE DIGITAL JOURNEY





BREAK



OFFICE PRINTING SOLUTIONS

TUAN TRAN | GLOBAL HEAD & GM, OFFICE PRINTING SOLUTIONS

DISRUPT THE OFFICE

CORE

Grow profitable hardware share



↑ Share A4 +1% to 47%
A3 +2% to 9%

Market A4 #1
A3 #5 (+2)

BLI most reliable 

GROWTH

Accelerate profitable contractual growth



MPS Rev ↑ \$

Share 10% #3

Highest net promoter score

Transform business printing with new categories & business models



Apogee acquisition

Leverage the Samsung acquisition to accelerate leadership agenda ✓

WORKFORCE



50% of Millennials spend **5** hours per day on smart phones, **3X** Boomers

Digital natives
Doing good
Dynamic talent pool

WORKPLACE



62% of people working from more than one location.
Office space has reduced by **40%** in the past decade

On-the-go / mobile
Shared spaces
More vulnerable

WORKSTYLE



47% of End Users check work email after 11pm
32% of work is done outside the office

Always-on / cloud centric
Highly collaborative
One life

TRENDS TRANSFORMING THE OFFICE

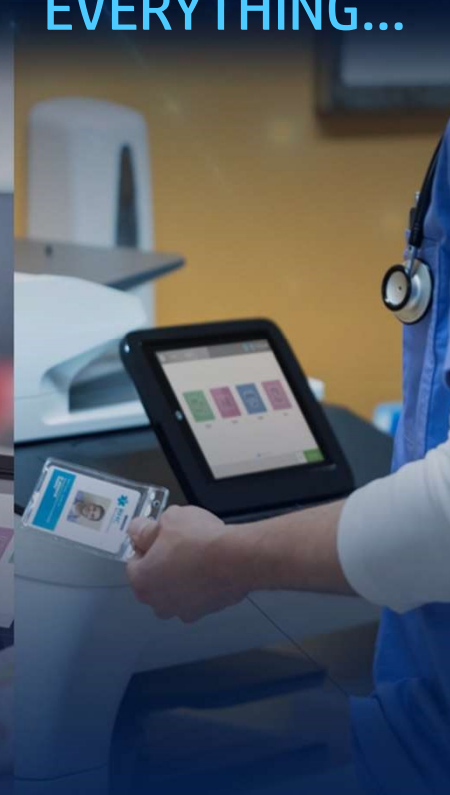
EVERYTHING...



SMART



PERSONALIZED



SECURE



AS-A-SERVICE



SUSTAINABLE
IMPACT

PAPER'S CRITICAL ROLE IN THE OFFICE

Understand & internalize



Comprehend
Recall

Increase impact



Present / share
Engage
Enable creativity

Bridge physical & digital



Document and record
Regulatory
Archival

EVOLUTION OF PRINTING



OUT OF THE PATH
OF WORK

HARD TO
CONNECT



DISCONNECTED
WORKFLOW



FREQUENT
DOWNTIMES

TRANSFORMING OFFICE PRINTING & IMAGING

OFFICE EXPERIENCE REDEFINED

Truly mobile enabled:
print anywhere **HP ROAM**



Integrated with how I work
JETADVANTAGE APPS



MOST SECURE PRINTERS
on the planet

LEADING TECHNOLOGY
PAGEWIDE & LASER

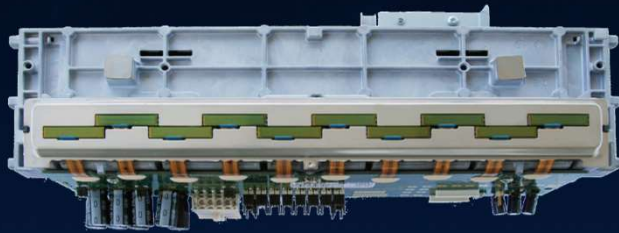


Intelligent machines that
never go down
SMART DEVICE SERVICES

INDUSTRY LEADING TECHNOLOGY

PAGEWIDE

The best solution for everyday office printing



HP's lowest color cost at fastest speed

- Up to 80 ppm on A3 & 75 ppm on A4
- Third generation PageWide

Most environmentally-friendly

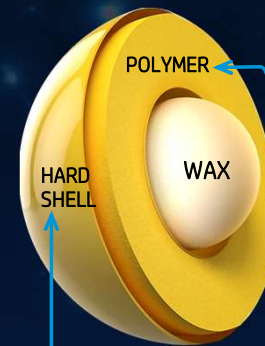
- Up to 73% less energy & 95% less supplies & packaging waste

Best print quality on specialty media

- Almost 60,000 nozzles delivering pigmented inks

LASERJET

The gold standard in printing



JetIntelligence Toner Technology

Soft core

- Melts at a low temperature
- Enables fast printing
- Uses less energy
- Provides legendary print quality

Durable shell

- Enables higher yields



Up to **53%**
LESS ENERGY

Up to **40%**
FASTER

Up to **40%**
SMALLER

Up to **33%**
MORE PAGES

Vs Previous Gen LaserJet

Best image quality on any paper

Highest durability

Best for high-density color

MOST SECURE PRINTING



Most Resilient Printers
Protect, Detect, *Recover*



Data & Document
Security Solutions



Security Policy
Management Services



Simple Security
Assessment Tools (new)



Most Comprehensive
Security Management
(new)

Microsoft SCCM Integration
MacAfee SIEM Integration

VIDEO #4
MPS/Security



Access to prints, not printers

HP ROAM FOR BUSINESS

PRINT VIRTUALLY ANYWHERE, FROM ANY DEVICE, SIMPLY AND SECURELY



- ✓ Submit anytime, anywhere, from any device
- ✓ Release at any Roam-enabled device at the office, guest printer, or public print locations
- ✓ Collect without needing a specific printer driver or to be on the same network
- ✓ Encrypted from submission to authorized release
- ✓ No risk of your documents in the wrong hands

THE #1 IT CHALLENGE FOR WEWORK

How do you enable all members to print easily from
any device to any printer in any office?

A corporation with
459 office locations
across 90 cities

268,000
users across the globe

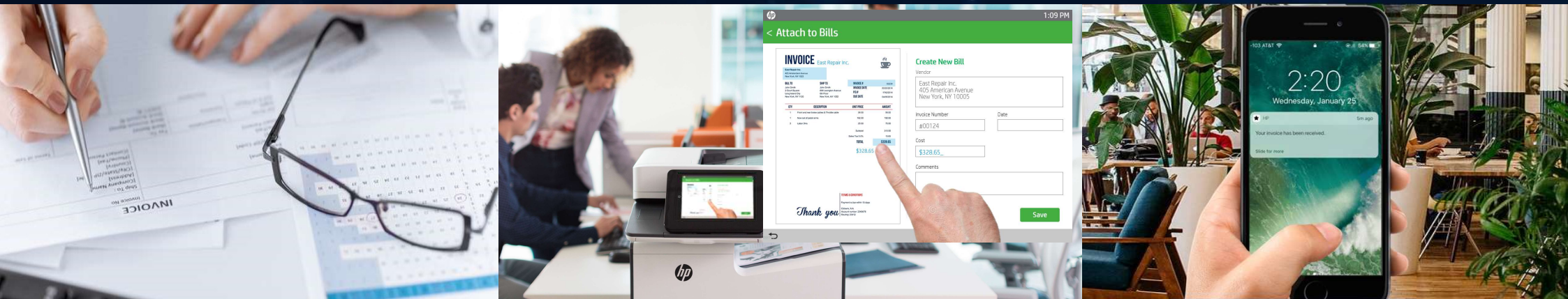
Members travel
across different
offices and locations

Unconstraint variety
of smartphones,
tablets, laptops

All users share at least
one thing in common:
The need to print

HP ROAM FOR BUSINESS

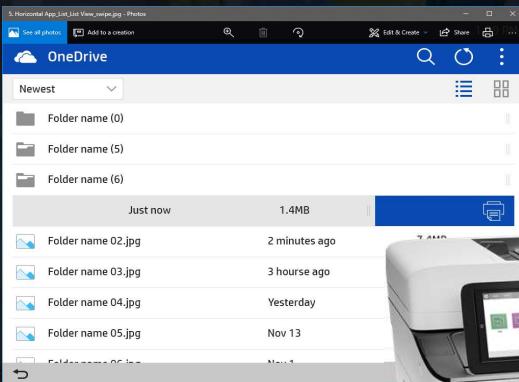
JETADVANTAGE APPS



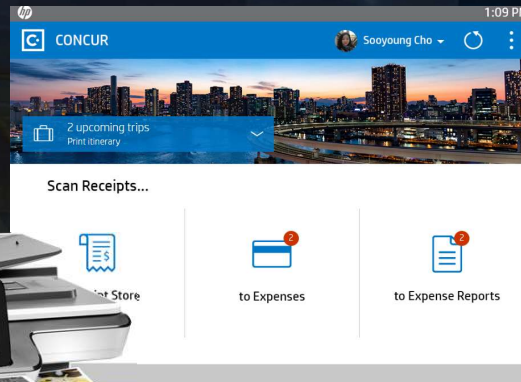
Paper Productivity at the Speed of Digital

PAPER AT THE SPEED OF DIGITAL

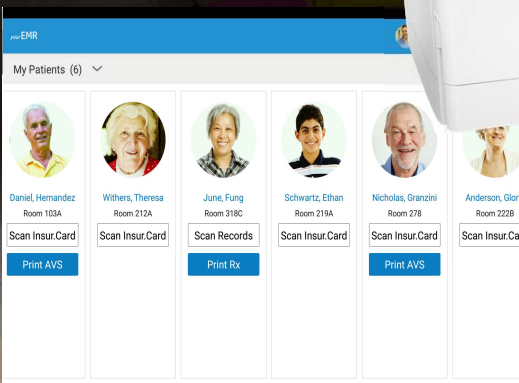
File Sharing workflows



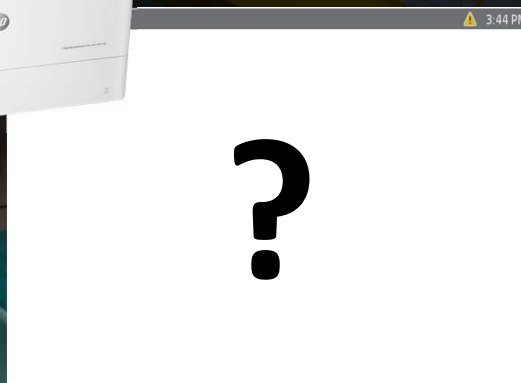
Departmental workflows



Vertical workflows



Your Local Workflow



Accelerate business workflows



Reduce Cost



Increase process compliance



Improve user productivity

LOWERING THE BARRIERS TO DEVELOP AND DELIVER VALUE AT SCALE

For Developers

Developer Program



The fastest and easiest way to develop MFP software

App Catalogue



Connecting the largest reseller community to local developers

For Resellers

Delivery Platform



Remote installation, configuration and management

Cloud Services



Adding security, productivity and intelligence

SMART DEVICE SERVICES

INTELLIGENT MACHINES THAT NEVER GO DOWN



Image

Vibration

Supplies

Environmental

Scan Path

Print Path

Process

OVER 40 SENSORS

Machine Learning and AI enable

- Fix just before fail
- Remote service delivery
- Service efficiency
- Optimized device operation

SMART DEVICE SERVICES 1.0

INTEGRATION WITH LEADING TOOLS AND DRIVING LOWER SERVICE COSTS

EKM

KPAX Manage
by BLUEMEGA

MPS Monitor
Printer Monitoring in the Cloud

Jet Advice

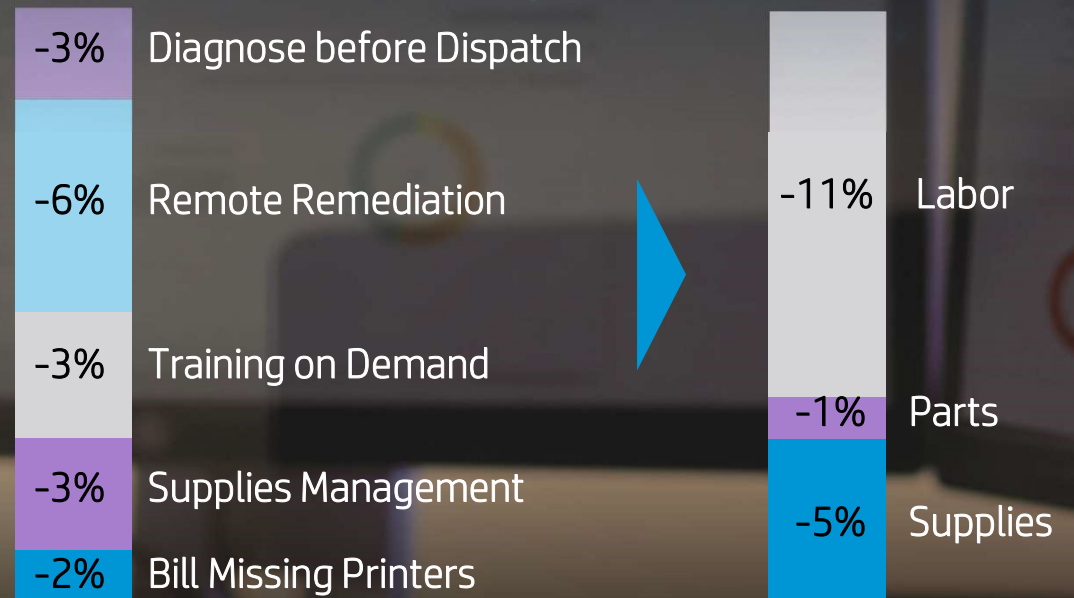
docuFORM

ECI fmaudit
ECI e-automate

OneStop
MPSPortal

PRINT AUDIT
The Print Management Company

Service Cost Reduction



TRANSFORMING OFFICE PRINTING & IMAGING

OFFICE EXPERIENCE REDEFINED

Truly mobile enabled:
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MOST SECURE PRINTERS
on the planet

LEADING TECHNOLOGY
PAGEWIDE & LASER



Intelligent machines that
never go down
SMART DEVICE SERVICES

A man in a dark jacket and jeans is captured mid-jump in front of a wall covered in graffiti. The graffiti features large, stylized letters and colorful patterns in shades of teal, purple, and white. The man is wearing sunglasses and white sneakers. The overall scene is dynamic and urban.

LEADING THE GRAPHICS DIGITAL TRANSFORMATION

SANTI MORERA

| GLOBAL HEAD & GM, GRAPHICS SOLUTIONS

MARKET EVOLUTION



DRIVING EFFICIENCY

- Inventory
- Security
- Track and trace



DRIVING SPEED TO MARKET

- Shorter product life cycles
- SKU proliferation
- Fail fast



DRIVING PERSONAL CONNECTION

- Mass customization
- Regionalization
- Cause marketing

DRIVING EFFICIENCY

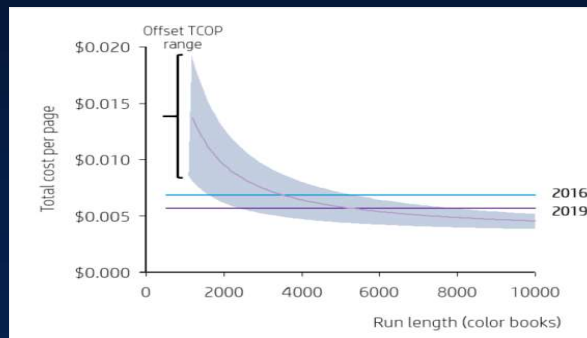


INVENTORY

COST A2D TRANSFORMATION

SECURITY / TRACK & TRACE

- **94%** of organizations say that digital transformation would change their supply chain
- Publishers fill rates average are at **85%**
- Some publishers end up pulping up to **40%** of what they warehouse

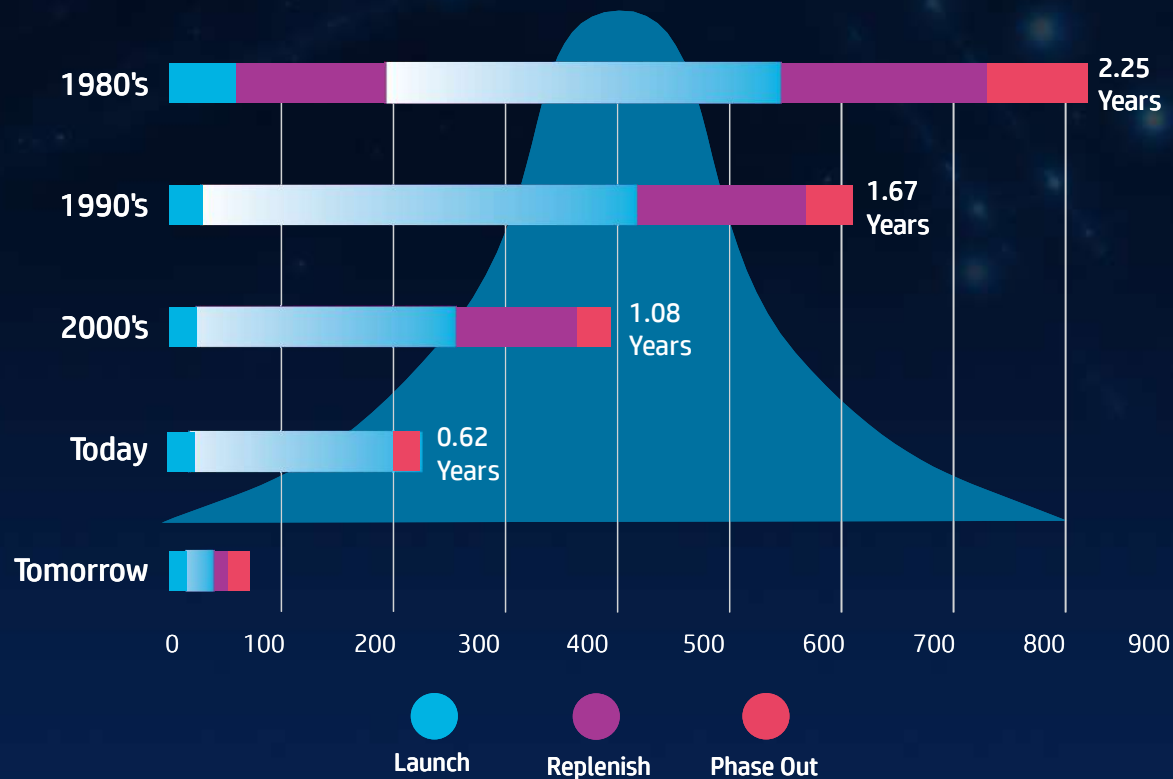


Most common counterfeit items

- Footwear **18%**
- Eyewear **13%**
- Electronics **15%**

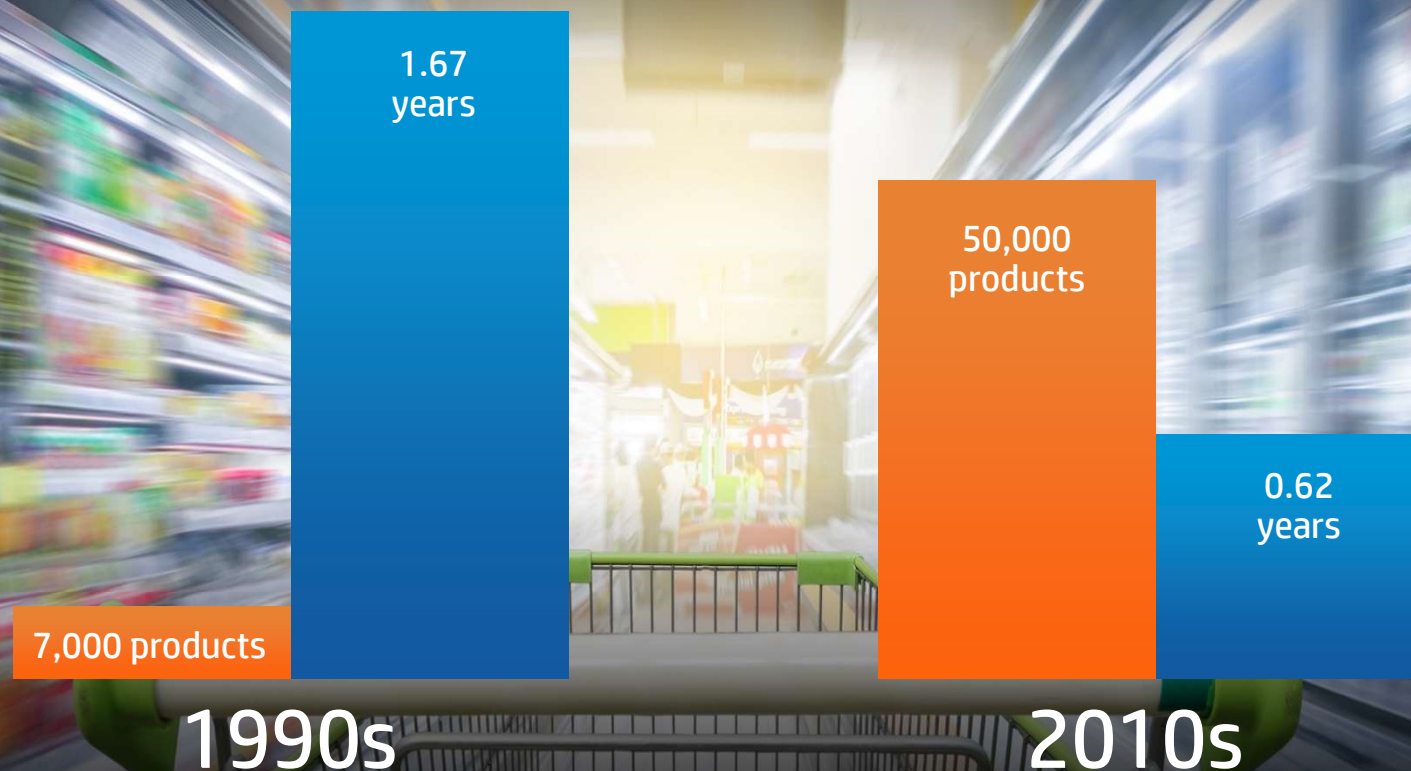


ACCELERATED INNOVATION ASKS FOR FAST CHANGING PRODUCTS



Source: Colgate-Palmolive business analysis

GROCERY STORES CARRY 40,000 MORE ITEMS TODAY THAN IN THE 90'S



Source: Grocery: The Buying and Selling of Food in America, 2017, Colgate-Palmolive business analysis

PERSONALIZATION THROUGH UNIQUE AND CUSTOMIZED PRODUCTS

20%

of consumers are willing to pay 20% more for personalized products

50%

of consumers are more likely to shop if they are recognized by their names

70%

are more likely to shop at a retailer that remembers their previous purchases



Source: Accenture interactive

GRAPHICS MARKET \$51B TAM ACROSS 6 BROAD APPLICATIONS



DESIGN & TECHNICAL PRODUCTION



SIGNAGE AND DECORATION



GENERAL COMMERCIAL & PUBLISHING¹



LABELS



PACKAGING²



TEXTILES³

2018 TAM		DESIGN & TECHNICAL PRODUCTION	SIGNAGE AND DECORATION	GENERAL COMMERCIAL & PUBLISHING ¹	LABELS	PACKAGING ²	TEXTILES ³
Total (\$B)	51.2 CAGR ⁴ : 3%	2.4 0%	3.3 2%	15.2 1%	4.7 2%	11.5 5%	12.9 4%
Digital (\$B)	18.1 CAGR ⁴ : 5%	2.4 0%	2.6 3%	2.5 6% HP play ⁵	6.1 0.5% No HP play ⁵	0.6 9%	2.2 11%
% Digital Penetration	36%	100%	~80%	57%	12%	3%	17%

Notes: 1. GCP excludes \$0.6B TAM coming from LF presses and SPS; 2. Packaging includes Corrugated, Flexible Packaging & Folding Carton; 3. Textiles Includes: Soft signage, Clothing, Home Textiles; 4. 18–23 CAGR; 5. HP Play includes mid-range production and high-volume production; No HP play in mono and Light / Low end production color
Source: June 2018 MAP sizing.

A photograph taken from the passenger side of a car, looking towards the driver. The driver, wearing a yellow shirt and a watch, is holding a smartphone up to take a picture of the Golden Gate Bridge in the distance. The car's interior, including the dashboard and steering wheel, is visible in the foreground. The text 'GRAPHICS STRATEGY' is overlaid in large, yellow, sans-serif capital letters on the left side of the image.

GRAPHICS STRATEGY

GSB STRATEGY

TRANSFORM GRAPHICS INDUSTRIES TO DIGITAL

DISRUPT APPLICATIONS WITH BREAKTHROUGH TECHNOLOGY

Extend leadership in Design, Signage and GCP¹

Accelerate A2D² in Labels & Packaging

Expand to new applications (Textiles)



PARTNER WITH BRANDS

Engage consumers

Speed time to market

Improve supply chain & drive high security



BUILD SOLUTIONS ECOSYSTEM

Reinvent PSP operations (optimize, automate, grow)

Expand to brand/end-user solutions

Drive simplified, E2E³ service experience



¹General Commercial and Publishing / ²Analog to digital / ³End to end

GSB STRATEGY

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HP PrintOS

A PRINT PRODUCTION CLOUD PLATFORM

WITH WEB AND MOBILE APPS CONNECTED TO HP PRESSES AND PRINTERS.
ACCESSIBLE ANYTIME, ANYWHERE.



Optimize

Get more from your HP presses / printers



Jobs



Knowledge Zone



Learn with HP



Media Locator



Resource Manager



Service center



Service center for Channels



Uptime Kit



Substrate Manager



Print Beat



Supplies inventory



Mobile Application



Automate

Simplify and automate production



Box



Composer



Imposer



Site Flow



Application center



Piazza



Marketplace



Open API



Grow

Innovate, collaborate and grow



Optimize

COLOR CONSISTENCY ACROSS THE WORLD, LEVERAGING PRINTOS INFRASTRUCTURE



1 | PROOF

Automatically match industry printing standards with **Media Fingerprint**



2 | PRINT

Keep impeccable color consistency across presses and time using 3D calibration



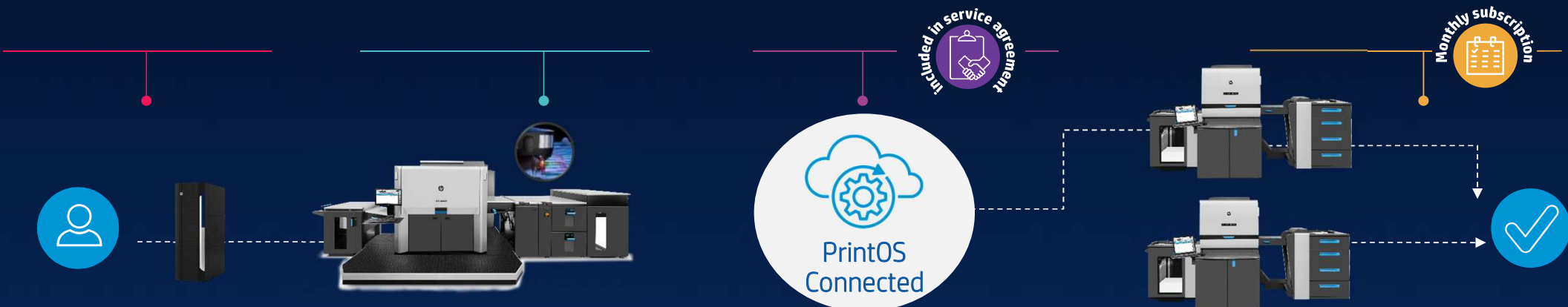
3 | SHARE

Easily share and manage color assets between presses and sites via PrintOS Substrate Manager



4 | CONTROL

Track your color status anytime, anywhere with HP PrintOS Color Beat



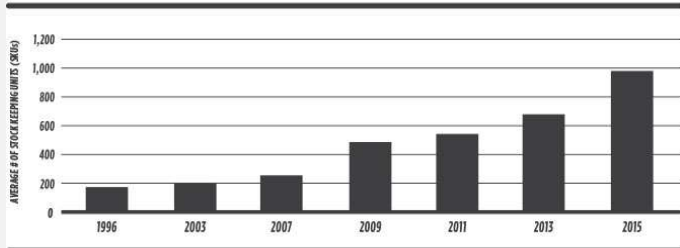


Automate

E-COMMERCE AND SKU PROLIFERATION DRIVE GROWTH IN PERSONALIZED PRINT



AVERAGE NUMBER OF SKUs CARRIED BY DISTRIBUTORS

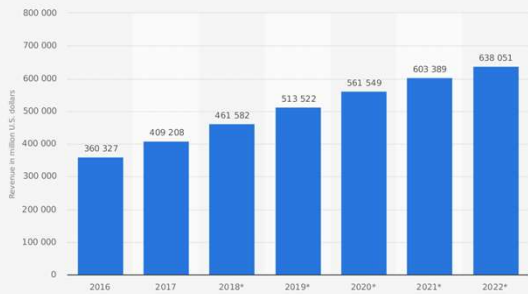


National Beer Wholesalers Association's 2015 Distributor Productivity Report

“2 years ago we produced 180 jobs a day. Last year 540 jobs a day. This year we are averaging 5800 with some days peaking at around 30000!”

Jon Bailey, CEO | PROCO

Retail e-commerce sales in the United States from 2016 to 2022 (in million U.S. dollars)



Sources: Statista DMO, Statista © Statista 2018
Additional Information: United States: Statista DMO, 2016 to 2017





Automate



PRODUCING THOUSANDS OF MICRO ORDERS PER DAY WITH HP PrintOS SITE FLOW



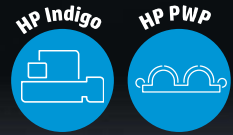
ALL-IN-ONE, END-TO-END, ROBUST AND SCALABLE





Automate

HP PrintOS SITE FLOW ENABLES BRANDS TO EXPAND QUICKLY



brands and online retailers effectively manage a global network of print service providers





Grow

HP PIAZZA HELPS PUBLISHERS TO REVOLUTIONIZE SUPPLY CHAIN





Grow

HP PrintOS MARKETPLACE OFFERING



APPS

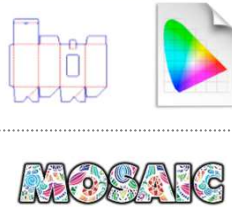
LICENSES

IDEAS

SERVICES

CONSULTANTS

CONNECTORS



- HP or 3rd Party
- Standalone and/or part of RBA backbone
- Cloud based / SaaS

- Online reselling
- Perpetual or SaaS
- Off-the-shelf solutions
- Press / printer options

- Sharing between PSPs
- ICC Profiles, VDP seeds, die-lines, etc.
- Knowhow / recipes

- Care-Packs
- Training
- Certifications

- Yellow pages listing
- Search by expertise and geography

- Configure automatic submission from external sources directly to print

GSB STRATEGY

TRANSFORM GRAPHICS INDUSTRIES TO DIGITAL

DISRUPT APPLICATIONS WITH BREAKTHROUGH TECHNOLOGY

Extend leadership in Design, Signage and GCP¹

Accelerate A2D² in Labels & Packaging

Expand to new applications (Textiles)



PARTNER WITH BRANDS

Engage consumers

Speed time to market

Improve supply chain & drive high security



BUILD SOLUTIONS ECOSYSTEM

Reinvent PSP operations (optimize, automate, grow)

Expand to brand/end-user solutions

Drive simplified, E2E³ service experience



¹General Commercial and Publishing / ²Analog to digital / ³End to end

OFFERING BRANDS THE INNOVATION AND DIFFERENTIATION



ENGAGE



Customisation / Personalization (Consumer engagement)

- Mass customization
- Variable data
- Personalization
- Faster response to trends
- Limited Editions



SPEED



Speed / Time to Market (Agility)

- Just-in-Time production
- Faster response to regulatory changes
- Faster response to trends
- Demand planning



SAVE



Supply Chain Transformation (Security, T&T and Inv. Man't)

Supply chain efficiency

- Warehousing due to minimum inventory
- Reduce obsolescence
- Product life cycle management

Reduced risk

- Anti-Counterfeit components
- Regulatory compliance
- Track and trace
- Serialization
- Market testing
- Print quality and consistency

OFFERING SCALABLE SOLUTIONS

3.2 million

Aqua d'Or bottles in
one-of-a-kind
packaging designed in

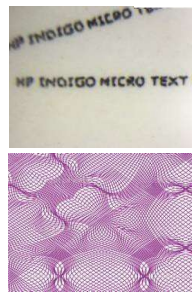
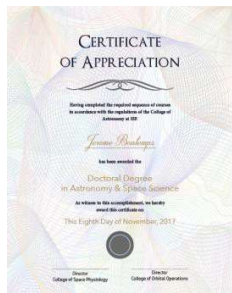
2 weeks

to target millennials.



GROWING NEED FOR BRAND PROTECTION

SPECIAL GRAPHIC ELEMENTS AND SUBSTRATES



ON PRESS
IN ONE PASS

SPECIAL INKS



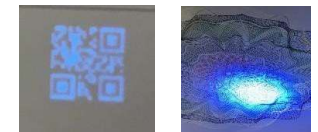
Infra-Red (IR) Ink



Taggant Ink



Invisible Yellow



Invisible Blue

HP LINK / T&T SOLUTIONS

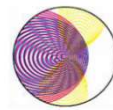


Watermark

Document or Image

NEW

Secure QR



Digital Watermark

NEW

HP SECURITY SOLUTIONS PROTECT BAUMANN FARM FROM COUNTERFEITING



ACTIVE BRAND ENGAGEMENT



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DISRUPT APPLICATIONS WITH BREAKTHROUGH TECHNOLOGY



DESIGN & TECH.
PRODUCTION



SIGNAGE &
DECORATION



GENERAL
COMMERCIAL &
PUBLISHING



LABELS



PACKAGING



TEXTILES

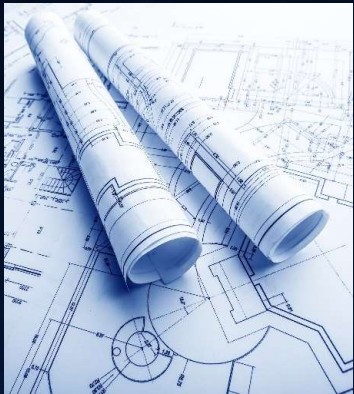


ACCELERATE
in current markets



EXPAND
to new markets

DISRUPT APPLICATIONS WITH BREAKTHROUGH TECHNOLOGY



DESIGN & TECH. PRODUCTION

MFP
Experience
Security
Photo



SIGNAGE & DECORATION

Latex on Rigid
with white ink



GENERAL COMMERCIAL & PUBLISHING

HP Piazza
Page Wide HDNA
HP Indigo 12000 HD



LABELS

HP Indigo 6900
Pack Ready
GEM-Embellishment



PACKAGING

C500 launch



TEXTILES

Coming in FY19

HP PAGEWIDE C500 PRESS

LAUNCHED IN H2 FY 2018



Atlanta, GA, USA



Charlotte, NC, USA



Austria



Italy

10 SIGNED CONTRACTS

• **4 PRESSES INSTALLED**





CARL JOACHIM | CO-FOUNDER & CHIEF MARKETING OFFICER
EPAC FLEXIBLE PACKAGING

PRINT LEADERSHIP PANEL

Moderated by
Vanessa Yanez

Head of WW Print Communications



Enrique Lores
President, Imaging &
Printing Business



Anneliese Olson
Global Head & GM,
Home Print Solutions



Tuan Tran
Global Head & GM,
Office Print Solutions



Santi Morera
Global Head & GM,
Graphics Solutions

PRINT LEADERSHIP PANEL

WELCOME BACK

Thursday Afternoon, November 1

1:00 – 1:30 PM	3D PRINTING	Dr. Tim Weber, Global Head of 3D Printing Metals
1:30 – 1:45 PM	TRANSITION TO ROUNDTABLE / TOURS	All
1:45 – 2:30 PM	GRAPHICS ROUNDTABLE	Analyst Group 1
1:45 – 2:30 PM	3D PRINTING LABS TOUR	Analyst Group 2
2:30 – 2:45 PM	BREAK	Analyst Group 1
2:30 – 2:45 PM	CWC TOUR	Analyst Group 2
2:45 – 4:15 PM	1:1 MEETINGS	All
3:45 – 4:45 PM	3D PRINTING LABS TOUR / CWC TOUR	Analyst Group 1
3:45 – 4:45 PM	BREAK	Analyst Group 2
4:45 – 5:00 PM	TRANSITION TO GARAGE TOURS	All
5:00 – 6:00 PM	BREAK OR GARAGE TOURS	All
6:00 – 6:45 PM	BREAK OFFSITE	All
7:00 – 9:00 PM	DINNER WITH PRINT LEADERSHIP TEAM	All





CHANGING THE WAY THE WORLD DESIGNS AND MANUFACTURES

TIM WEBER | 3D PRINTING BUSINESS

HP 3D PRINTING PROGRESS

STRONG POSITION

#1
IN COMMERCIAL
PLASTICS¹

CUSTOMER, PARTNER,
AND GEO **GROWTH**

DRIVING PRODUCTION

2018'S **MOST USED**
INDUSTRIAL 3D PRINTER²

50%+
OF BENCHMARKS
FOR PRODUCTION³

ENABLING APPLICATIONS

PRODUCTION PARTS ACROSS
TRANSPORTATION, INDUSTRIAL,
MEDICAL, CONSUMER

10X THE APPLICATIONS,
1000+ TODAY³

INNOVATION FOR GROWTH

COLOR AND METALS
SOLUTIONS LAUNCHED

SOFTWARE AND
DATA SERVICES

1. CONTEXT, Q1CY18

2. 3D Hubs Digital Manufacturing Trends report

3. HP Internal Analysis, September 2018

TRANSFORMING THE INDUSTRY

POTENTIAL FOR
3D PRINTING



SIX KEYS



Product capabilities



Material price



Material selection

Unlock



Design for additive



New supply chain



Standards and policy

Accelerate

1. Per HP internal estimate

OUR PORTFOLIO – 2017



HP JET FUSION 4200 Production

OUR PORTFOLIO – TODAY



HP JET FUSION 4200¹
Production



HP JET FUSION 4210¹
Mass production



**HP JET FUSION
300/500 SERIES²**
Full color prototyping
and short runs



HP METAL JET³
Mass production

**OPEN MATERIALS
PLATFORM**

**INTEGRATED
SOFTWARE SUITE**

**BIG DATA AND
ANALYTICS BACKBONE**

1. Available now

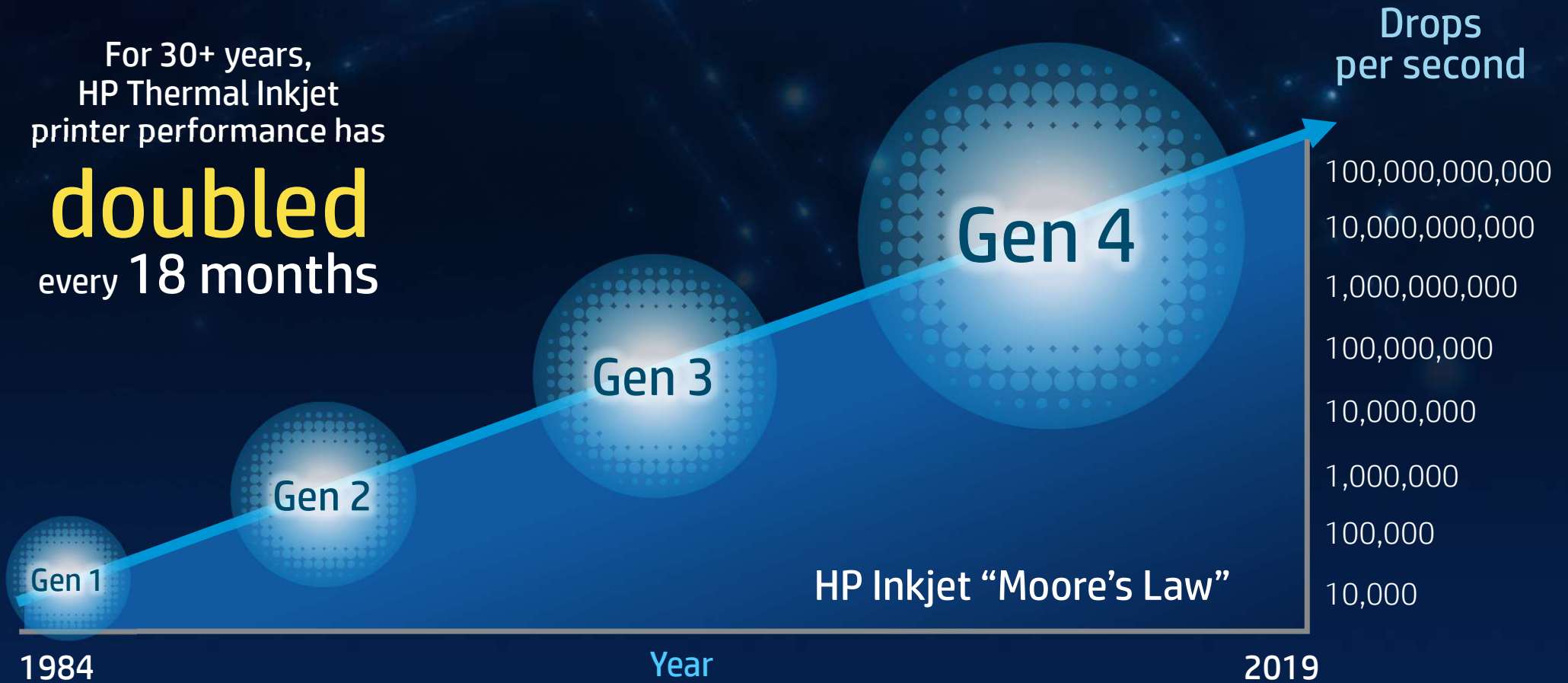
2. Available to select customers in 2018. General availability in 2019

3. Production Service available in 2019. Select Metal Jet availability in 2020, broad availability in 2021

PLATFORM: THERMAL INKJET

For 30+ years,
HP Thermal Inkjet
printer performance has

doubled
every **18 months**



PLATFORM: OPEN MATERIALS

EXPANDED MATERIALS
PORTFOLIO



NEW APPLICATIONS
NEW MARKETS



GLOBAL EXPANSION
FROM LEADING PARTNERS



VERTICAL MARKET FOCUS

TRANSPORTATION



INDUSTRIAL



MEDICAL



CONSUMER



APPLICATIONS GROWTH

TRANSPORTATION

EV BATTERY COOLING



MOTORBIKE MANIFOLD



TRAIN DOOR SUPPORT



INDUSTRIAL

ROBOTIC ARM



TUBE BENDING TOOL



ROBOT ARM GRIP



MEDICAL

DENTAL ALIGNERS



ORTHOTICS



PROSTHETICS



CONSUMER

VR HEADSET AND CHARGER



BIKE HELMET



PERSONALIZED / CUSTOM FOOTWEAR



REINVENTING HP WITH MULTI JET FUSION

FASTER TIME
TO MARKET
2 – 6 months

REDUCED
COST
~\$10M

REDUCED
LEAD TIME
6 – 8 weeks

INNOVATIVE
PRODUCTS
Improved experience

HP Z 3D CAMERA



HP INKJET PRINTHEADS



HP SPROCKET



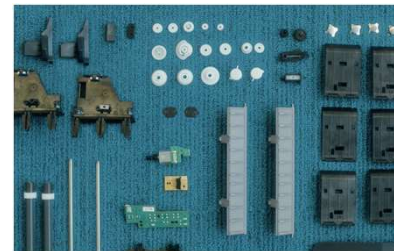
TANK MIXER FOR INDIGO



300/500 SERIES AIR DUCT



LFP SPARE PARTS



JET FUSION 300/500



NOTEBOOK ADAPTER





PRODUCTION CUSTOMERS ARE SCALING

30%+
OF INSTALLED BASE
ARE MULTI-UNIT DEPLOYMENTS

HP METAL JET DESIGNED FOR MASS PRODUCTION

UP TO
50X
MORE
PRODUCTIVE



COST
EFFECTIVE
SOLUTION FOR
HIGH-VOLUME

HIGH
QUALITY
FINAL
METAL PARTS

LARGE BEDSIZE



LESS THAN \$399K¹



STAINLESS STEEL

1. Pre-order reservations today, broad commercial availability 2021. Cost of the Metal Jet printer.

METAL JET PARTNERS AND CUSTOMERS



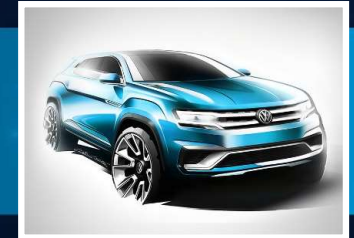
wilo



MULTI-YEAR PLAN

New architectures

2021+



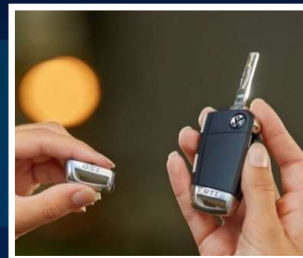
Functional production

2019+



Mass customization

Today





CHANGING THE WAY THE WORLD
DESIGNS AND MANUFACTURES

DRIVING THE
NEXT DIGITAL
INDUSTRIAL REVOLUTION

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Parking Lot

A photograph of the Golden Gate Bridge tower on the right, with the San Francisco skyline and the bay in the background under a sunset sky. The image is overlaid with a grid of thin vertical lines.

THANK YOU



POWER OF PRINT ANALYST SUMMIT 2018