Disrupting the Printing Ecosystem

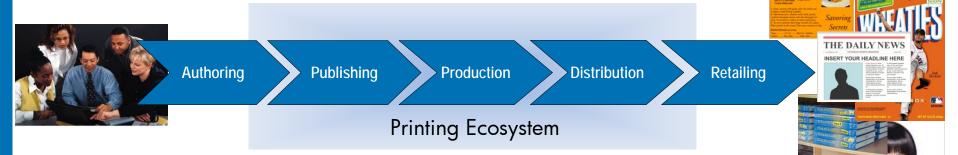
Glen Hopkins Business Unit Manager, Printing Technology Platforms



e=cards

Delivering Printed Content to End-Users

- The Value Chain is the delivery vehicle for Content
 - from creation (Authoring) to consumption



- Content is the payload
 - produced efficiently, quickly, economically, and with minimal waste
 - delivered to the right consumer
 - delivered with the form and function appropriate to the application



Printing Ecosystem



- HP products and services support the *Printing Ecosystem* at the heart of the Value Chain
- HP printing solutions cover a broad spectrum of markets and applications





Disrupting the Printing Ecosystem

- The first big disruption of the printing ecosystem (ca. 1450) was the Gutenberg Bible
 - this is the first known book printed with moveable metal type
- Each copy of the original Gutenberg Bible required the skins of 300 sheep.
- Today, due to low demand and a complicated manufacturing process, books made from sheep are expensive and hard to find.

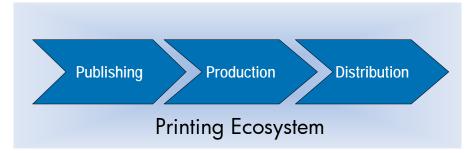








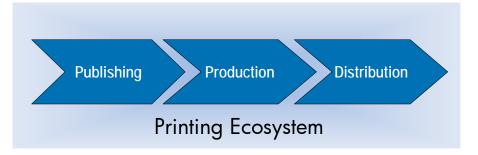
Disrupting the Printing Ecosystem



- Print is not going away it is more relevant than ever before to consumers and enterprises
- Why disrupt the Printing Ecosystem?
 - to take advantage of opportunities and capabilities enabled by a pervasive and powerful digital infrastructure
 - to publish, produce and distribute printed material with the customization, efficiency, and immediacy provided by digital processes
 - Ex.: books, newspapers, mail, photos, packages, and signage
 - to open new printing markets with innovative products and services



Disrupting the Printing Ecosystem what is HP doing?



- Developing solutions based on HP's core competencies in both information technology and printing technology
- Leading and supporting development of the WW digital information infrastructure
- Delivering printing solutions that bring print fulfillment closer to the end-user
- Reducing the environmental impact of printing
- Innovating new solutions across all of HP's current printing markets
 - delivering advanced printing technologies, inks, and media
 - leveraging HP's R&D and manufacturing resources
 - entering new markets with proven technologies



Disrupting the Printing Ecosystem

Let's look at some key developments and opportunities



- Marketing Collateral and Mail
- Books and Manuals
- Newspapers
- Packaging
- Signage



Home Printing

Home printing



- Faster broadband delivers virtually unlimited digital content for entertainment, education, and personal/household management
 - shopping and services (financial, medical, recreational)
- Seamless integration of the Internet-enabled functionality
 - the Internet becomes embedded in everyday devices in the same way as computers
 - Q: do you know how many computers are in your home? your car? your pockets?
- Total mobility
- Fast and reliable printing and sharing of documents and photos











Small and Medium Business

SMB office



- Unprecedented access to information opens new markets and supports development of specialized services
 - market and customer demographics
 - customer targeting
 - technical resources
 - maps, graphics, and content
 - professional expertise
 - authoring tools to develop personalized content
- Easier than ever to set up "virtualized" businesses
- Transformation of marketing collateral and mail
 - from "carpet bombing" to "precision-guided"
 - cost savings from reduced waste and higher utilization













Marketing Collateral and Mail "The Last Mile"

- People like getting REAL mail!
 - personalization is key for both personal and business mail
 - personalized by the sender (images and information about the sender)
 - Ex.: personalized postage from <u>stamps.com</u>
 - personalized to the recipient
 - more than just your name, something about you to grab your attention
- Local print production reduces transportation costs, energy use, and response time
- 21st century printing: *compose globally, print locally*
 - create content (everything from a post card to a magazine)
 - compose it anywhere in the world
 - print it at (or near) the destination
 - deliver it faster and cheaper than shipping from the point of origin





Books, Manuals, and other Published Material

- People still love to read books
- Books and manuals are user-friendly
 - easy navigation and annotation
 - ergonomic
- More titles were produced in the last decade than in all of recorded history
- Authoring tools allow individuals to create and publish books
- 30%+ of all printed books are scrapped without anyone reading them
- The average university student pays over \$1000 per year for textbooks and course materials
- Electronic databases keep books "in print"
 - legacy titles are being optically scanned and cataloged
- By 2010, a major disruption will occur with more than 5% of all books printed digitally (Source: Interquest)











Newspapers

- Newspapers rank 2nd to the USPS in "home delivery" volume
- News readership and advertising is moving to mobile and broadband
- Digital fulfillment of localized and personalized content opens new market opportunities
 in both on line and print modia
 - in both on-line and print media
- "Free" and targeted publications emerge from local and regional newspapers to better serve specific communities and markets
- A major disruption will come from high-speed inkjet web presses
 - 100% variable content page-to-page
 - high print quality on uncoated stock







Packaging

- "Packaging is the expression of the soul of every product" (Peter Brabeck, Nestlé CEO)
- Packages serve many purposes
 - provide product and brand security: contain, protect, and dispense
 - grab the customer's attention, stand-out on the shelf
 - track and trace inventory, provide electronic check-out
- Brands (even traditional ones) are changing their packaging at a very rapid rate

 to add functionality and point-of-purchase appeal
- In 2008 twice as many new products introduced vs. 1998
- The average supermarket manages 40,000 SKU's
- A major disruption will come from producing short-run custom packages, labels, and inventory tags











Signage

- Urban life surrounds people with colorful, informative banners and signage
- Digital content delivery and large-format inkjet printers produce display graphics with the immediacy and impact of today's news
- Outdoor durability requirements have driven solutions based on solvent inks and substrates (such as vinyl)
- A major disruption in the signage market will come from water-based inks with the performance of solvent inks and printed on recyclable substrates











Summary

- A pervasive transformation of the world's information infrastructure is underway driven by
 - broadband and mobile content delivery
 - unprecedented access to content
 - print and digital fulfillment moving closer to the user
 - environmental concerns
- With core competencies in both information technology and printing technology, HP is uniquely positioned to enable and advance this transformation
- Three key HP technologies that will disrupt the printing ecosystem will be presented today:
 - Scalable Printing Technology
 - Inkjet Web Press
 - Latex Printing Technologies





HP 4.25-inch Inkjet Printhead (close-up view)





Disruptive Inkjet Technologies

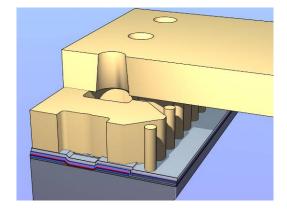
Dr. Ross R. Allen Senior Technical Specialist, Printing Technology Platforms





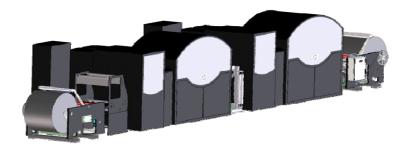
Scalable Printing Technology

HP Latex Inks





HP Inkjet Web Press



HP Inkjet Technologies matched to the application

• HP offers both piezo and thermal inkjet technologies for commercial and industrial printing solutions

- choice of technology depends on many factors
- HP thermal inkjet printheads
 - high nozzle density (1,200 nozzles/inch)
 - high print quality at high print speeds
 - design optimized for water-based inks
 - easy replacement (snap in/snap-out)
- HP Scitex X2 piezo inkjet printheads
 - introduced in the HP Scitex FB7500 printer (UV-curable inks)
 - 100 nozzles per inch, stackable to higher resolutions
 - 128 nozzles/printhead
 - high drop volume (up to 50pl)²
 - design optimized for industrial inkjet inks
 - snap in/snap-out design
- OEM piezo printheads are used in HP Scitex industrial inkjet printers





HP TIJ 4.25-inch printhead



HP Scitex X2 piezo printhead

HP Scalable Printing Technology



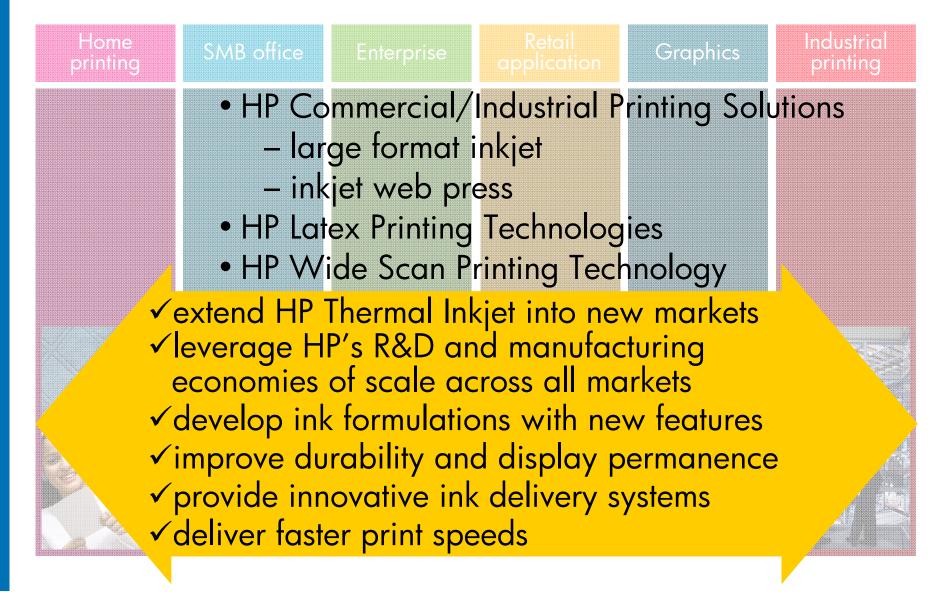
HP R&D invested more than 4 years and 1.4B\$ in SPT

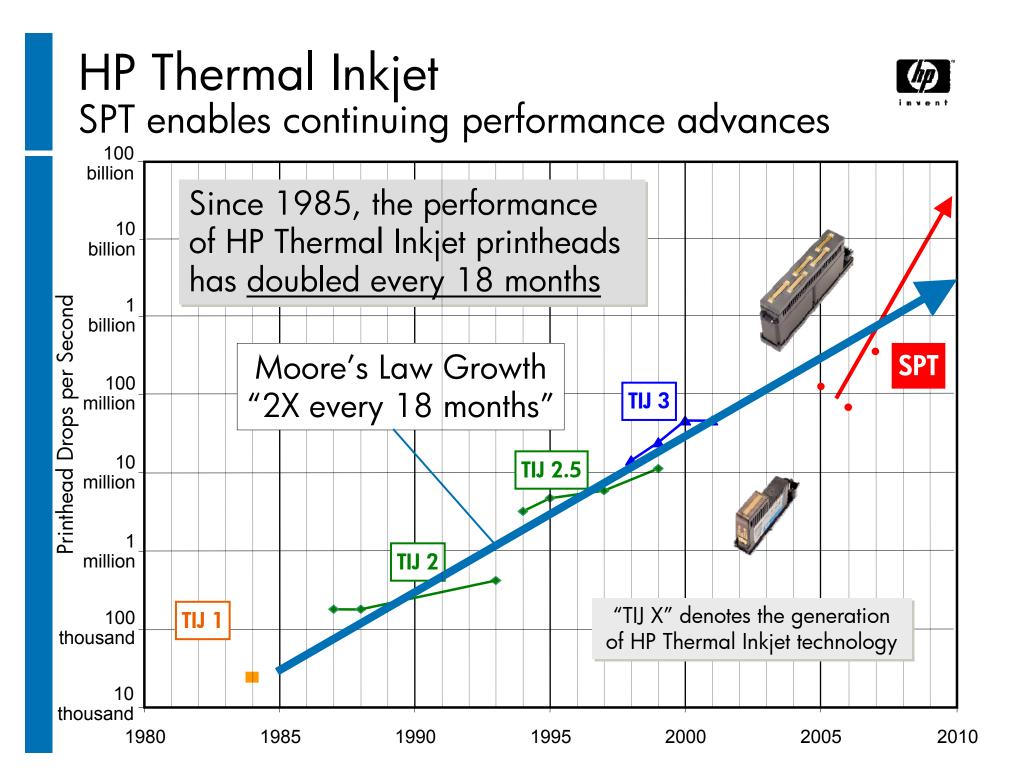
Home printing	SMB office	Enterprise	Retail application	Graphics	Industrial printing
		alable A Performo			

HP 2006 Inkjet Technologies



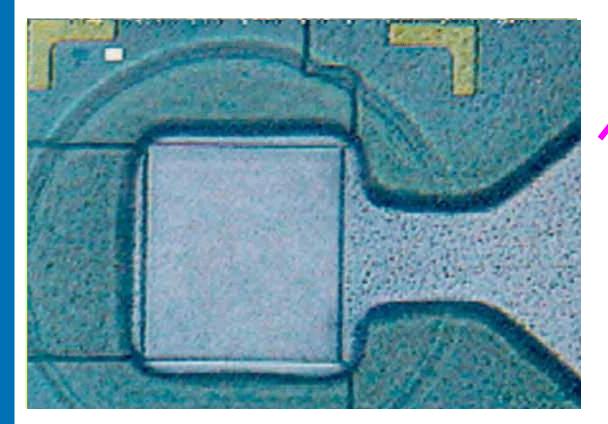
Scalable Printing Technology new options, new opportunities



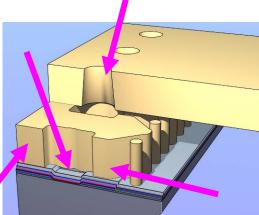


HP Thermal Inkjet Drop Generation "nothing moves but the ink itself"





Microscopic view under stroboscopic illumination of a vapor bubble cycle

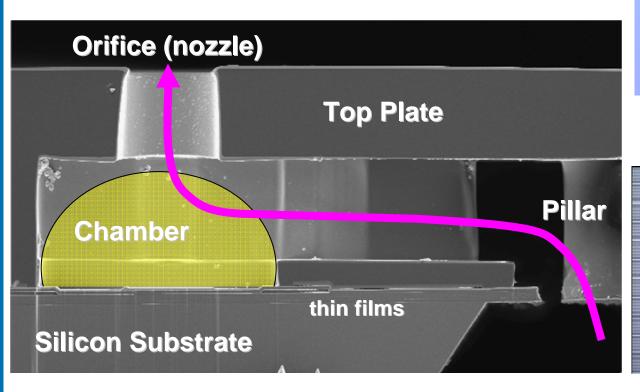


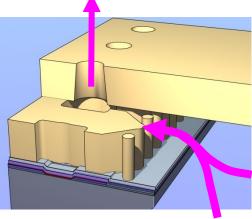
- barrier defines the walls of the chamber where the vapor bubble forms
- refill channel lets fresh ink flow into chamber
- heater generates the vapor bubble in the ink
- orifice is positioned over resistor to form a drop of ink



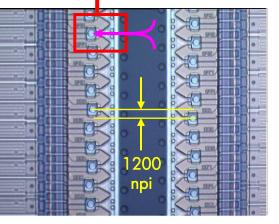
HP Scalable Printing Technology a breakthrough in printhead architecture

- entire printhead created photolithographically
 - precision alignment of chamber and nozzles to heater improves drop placement accuracy
- 1200 nozzles/inch across the ink feedslot
 - high nozzle density for fast printing



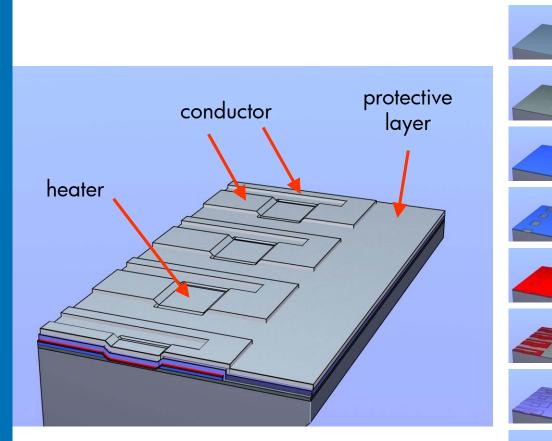






Making an SPT Inkjet Printhead (1) thin-films and heaters

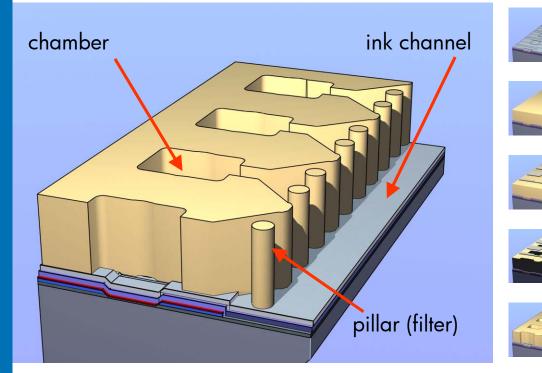




- silicon wafer
- grow oxide layer
- deposit conductor film
- etch window for resistor
- deposit resistor film
- etch conductor and resistor
- deposit dielectric film
- deposit tantalum film

Making an SPT Inkjet Printhead (2) drop generator chambers, channels, and pillars



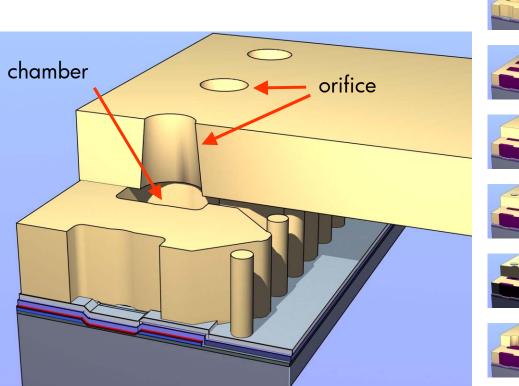




- use a negative exposure mask
- expose
- chemically develop unexposed areas

Making an SPT Inkjet Printhead (3) orifices





SPT: a monolithic printhead assembled with submicron precision



- fill chambers with "wax" to stabilize structures
- add photosensitive epoxy layer
- use a negative exposure mask
- expose

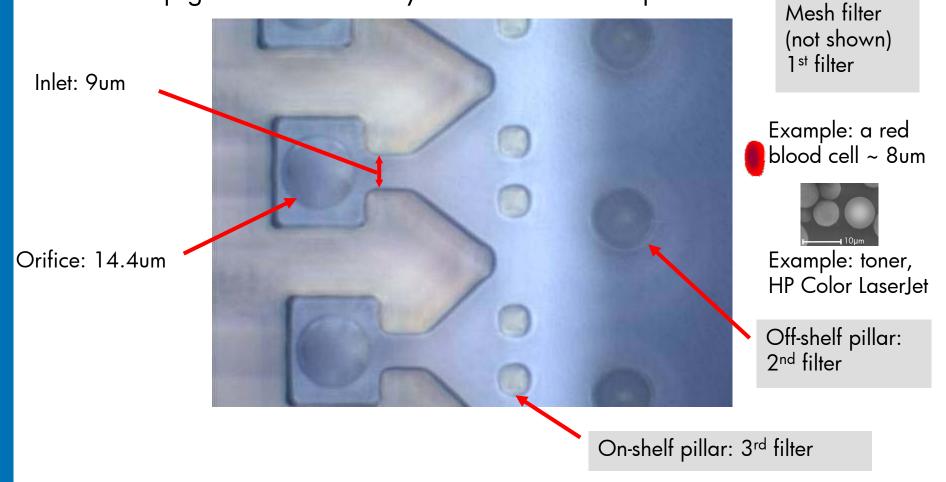
- chemically develop unexposed areas
- remove "wax"

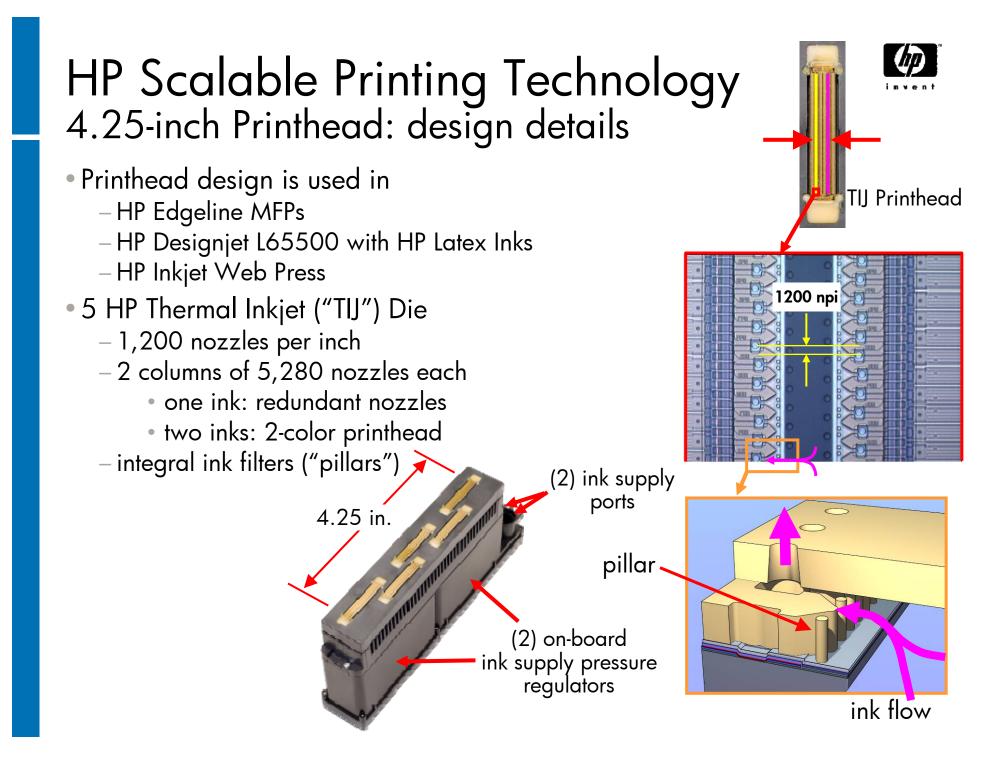


HP Scalable Printing Technology detail of drop generator and particle filters

small feature size for high nozzle density and high printing speed

• filters help guarantee reliability over the life of the printer





HP Latex Printing Technology





HP Latex Printing Technologies overview

• "Latex" is a descriptive term for <u>aqueous-dispersed polymers</u>

- polymer particles are dispersed (suspended) in the ink
- the polymer in HP Latex Inks is synthetic and chemically different from natural rubber latex
- HP Latex Inks are non-allergenic
- HP Latex Inks are <u>water-based</u>
 - designed to print on low-cost, uncoated, solvent-compatible media
 - Drying and Curing: HP Latex Inks vs. traditional water-based inks
 - HP Latex Inks require curing with heat inside the printer
 - ink vehicle is evaporated; latex particles coalesce into a durable film
 - prints made with HP Latex Inks are completely dry and ready-to-use out of the printer on all media
 - prints made with traditional water-based inks dry by evaporation or absorption of the ink vehicle
 - prints on swellable-coated or absorptive media (e.g., papers, etc.) must be dried outside the printer in air or by heat and forced air
 - porous-coated media absorb ink vehicle; prints are dry-to-touch out of the printer



HP Latex Printing Technologies overview

• Performance is comparable to solvent ink technologies*

- indoor, in-window/outdoor display permanence
- scratch-, smudge-, and water-resistance
- color gamut
- High productivity and reliability
 - -outdoor-quality prints at approx. 800 sq. feet/hour**
 - indoor-quality prints at approx. 400 sq. feet/hour**
 - HP Wide Scan Printing Technology
 - high image quality at high speed
 - HP Thermal Inkjet printheads
 - user-replaceable
 - snap-out / snap-in maintenance
 - no manual daily maintenance is required
 - printers using HP Latex Inks and HP Wide Scan Printing Technology employ fully-automatic printhead testing and maintenance systems.
 - prints are dry and ready-to-use
 - right out of the printer
 - prints are odorless***

* HP image permanence and scratch, smudge, and water resistance estimates by HP Image Permanence Lab. Display permanence tested according to SAE J1960 using HP Latex and solvent inks on a range of media, including HP media; in a vertical display orientation in simulated nominal outdoor display conditions for select high and low climates, including exposure to direct sunlight and water; performance may vary as environmental conditions change. Scratch, smudge, and water resistance tested using HP Latex and solvent inks on a wide range of HP media. Laminated display permanence using Neschen Solvoprint Performance Clear 80 laminate. Results may vary based on specific media performance. For more information, see <u>www.hp.com/go/supplies/printpermanence</u>.

** Outdoor-quality speed based on printing in 2-pass unidirectional print mode; indoorquality speed based on printing in 4-pass unidirectional print mode.

*** Printers using HP Latex Inks use internal heaters to dry and cure the latex polymer film. Some substrates may have inherent odor.









HP Latex Inks

a new category of commercial printing solutions

 HP Latex Inks provide the benefits of solvent-ink technology —like outdoor durability—without imposing the environmental, health, and safety considerations

- no special handling required
 - contain no materials requiring hazard warning labels (world-wide)
 - non-flammable and non-combustible
- -extremely low VOC emissions
 - co-solvents and their concentrations in HP Latex Inks are similar to HP's aqueous Designjet inks used WW in office environments without special ventilation
- prints are odorless* and dry, ready-to-use out of the printer
- no special work space ventilation is required**
- no ozone emissions***
- no Hazardous Air Pollutants (HAPs)***
- comply with Nordic Swan certification
- ink cartridges designed to reduce use of materials and to maximize usable ink

*** No ozone products expected based on ink composition and printing technology; HAPs per US Environmental Protection Agency Method 311.

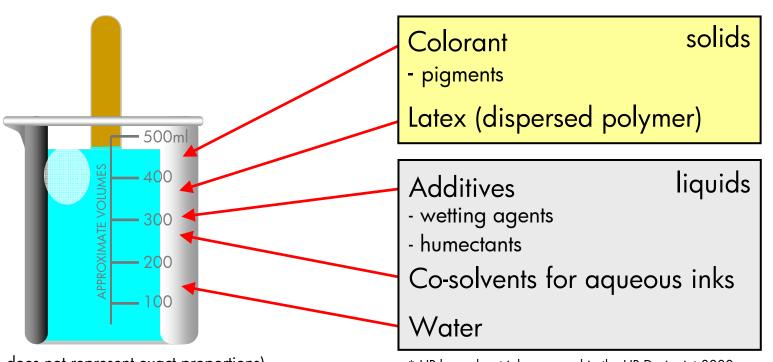
^{*} Printers using HP Latex Inks use internal heaters to dry and cure the latex polymer film. Some substrates may have an inherent odor.

^{**} Special ventilation is not required to meet US OSHA requirements on occupational exposure to VOCs from HP Latex Inks. Ventilation equipment installation is at the discretion of the customer—no specific HP recommendation is intended. Typically no air discharge permitting is required with inks that emit extremely low VOCs. Customers should consult state and local requirements and regulations.

HP Latex Inks liquid and solid components



HP Latex Inks deliver performance similar to HP low-solvent* inks using a water-based ink vehicle, co-solvent concentration similar to HP's aqueous Designjet inks, and HP's innovative Latex (dispersed) polymer technology



(figure does not represent exact proportions)

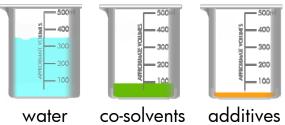
* HP low-solvent inks are used in the HP Designjet 8000s-, 9000s-, and 10000s-series printers

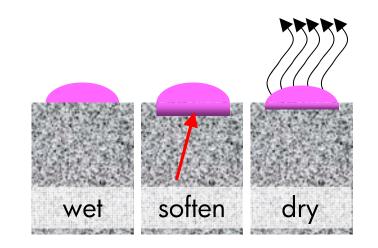
HP Latex Inks liquid components

- The ink vehicle is a blend of water (~70%), co-solvents for aqueous inks (<30%), and additives
- Working together, liquid ink components deliver:
 - consistent drop ejection (weight, speed, trajectory)
 - wet inside the drop generators (minimizes de-primes)
 - provide fluid viscosity and surface tension for optimal TIJ* printhead performance
 - clean the surface of the TIJ heater resistor
 - minimize viscous plugs of ink in the nozzle
 - controlled ink-media interactions
 - wet the surface of the print medium for dot size and color bleed control
 - soften vinyl for high colorant film adhesion
 - evaporate quickly to form a durable film for dry and ready-to-use prints right out of the printer

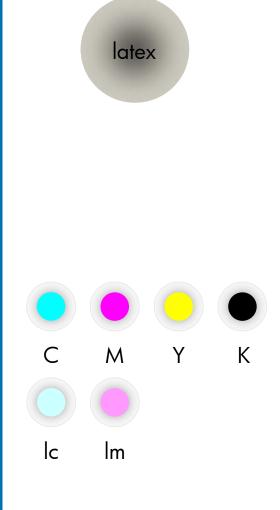
* HP Thermal Inkjet







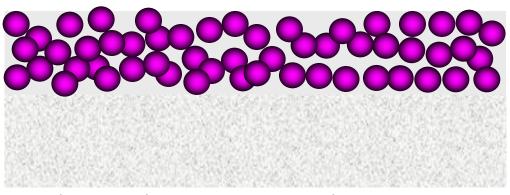
HP Latex Inks solid components





- Latex particles
 - developed by HP for reliable drop ejection and high print durability
 - produce a high molecular weight polymer film*
 - latex bonds to surface of both non-absorbent media (vinyl) and absorbent/coated media
 - particles coalesce on the media with evaporation of the ink vehicle and heating to create a continuous film
 - film encapsulates pigment particles
 - very good scratch resistance
 - excellent water resistance
- Pigment particles
 - -4-color, 6-color (and more) writing systems
 - higher pigment loading than most aqueous
 HP Designjet inks

HP Latex Inks image formation process



(schematic drawing is not to scale)



- Ink drop makes a colored dot on the media surface
- Ink vehicle softens vinyl for good film adhesion
- Print Zone Heater evaporates water from the ink vehicle
 - ink forms a thin liquid film on the media surface
 - pigment particles are dispersed throughout the film
 - dot is "fixed" to prevent color bleed and dot coalescence
- Curing Zone Heater causes latex particles to form a continuous film on the media
 - co-solvents evaporate
 - -latex particles coalesce
 - pigments are encapsulated
 - print is now dry and durable

HP Latex Inks durability and display permanence*

- Prints produced with HP Latex Inks achieve durability and display permanence comparable to solvent ink technology
- Durability*
 - scratch, smudge, and water-resistant on a range of HP media
- Display permanence
 - outdoors: up to 3 years unlaminated and up to 5 years laminated on a range of media*
 - indoors: in-window up to 5 years unlaminated and up to 10 years laminated on a range of media**

* HP image permanence and scratch, smudge, and water resistance estimates by HP Image Permanence Lab. Display permanence tested according to SAE J1960 using HP Latex and solvent inks on a range of media, including HP media; in a vertical display orientation in simulated nominal outdoor display conditions for select high and low climates, including exposure to direct sunlight and water; performance may vary as environmental conditions change. Scratch, smudge, and water resistance tested using HP Latex and solvent inks on a wide range of HP media. Laminated display permanence using Neschen Solvoprint Performance Clear 80 laminate. Results may vary based on specific media performance. For more information, see <u>www.hp.com/go/supplies/printpermanence</u>.

** Interior in-window display ratings by HP Image Permanence Lab on a range of media including HP media. HP in-window predictions based on test data under Xenon-Arc illuminant. Calculation assumes 6,000 Lux/12 hr day. Laminated display permanence using Neschen Solvoprint Performance Clear 80 laminate. For details: www.hp.com/go/supplies/printpermanence.







HP Latex Inks durability and display permanence^{*} (Legal Edition)

- Prints produced with HP Latex Inks achieve durability and display permanence comparable to solvent ink technology
- Durability*

- scratch, smudge, and water-resistant on a range of HP media

- Display permanence
 - outdoors: up to 3 years unlaminated and up to 5 years laminated on a range of media*
 indoors: in-window up to 5 years unlaminated and up to 10 years laminated on a range of media***



* HP image permanence and scratch, smudge, and water resistance estimates by HP Image Permanence Lab. Display permanence tested according to SAE J1960 using HP Latex and solvent inks on a range of media, including HP media; in a vertical display orientation in simulated nominal outdoor display conditions for select high and low climates, including exposure to direct sunlight and water; performance may vary as environmental conditions change. Scratch, smudge, and water resistance tested using HP Latex and solvent inks on a wide range of HP media. Laminated display perman-ence using Neschen Solvoprint Performance Clear 80 laminate. Results may vary based on specific media performance. For more information, see <u>www.hp.com/go/supplies/printpermanence</u>.

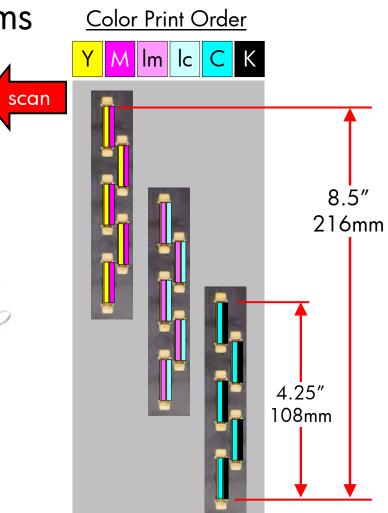
** Interior in-window display ratings by HP Image Permanence Lab on a range of media including HP media. HP in-window predictions based on test data under Xenon-Arc illuminant. Calculation assumes 6,000 Lux/12 hr day. Laminated display perman-ence using Neschen Solvoprint Performance Clear 80 laminate. For details, see <u>www.hp.com/go/supplies/printpermanence</u>.



HP Wide Scan Printing Technology scalable industrial writing systems <u>Color Print Orc</u>

• HP Wide Scan Printing Technology:

- Wide, scanning printhead arrays
 - 1,200 dpi (V)
 - high nozzle count (5,280/color)
 - high area coverage per swath
 - longer media moves (advances) between swaths
- HP Optical Media Advance Sensorprovides the breakthrough in
 - media positioning accuracy necessary for long advances
- Wide Swath + Accurate Media Advance
 - = High Quality at High Speed
 - outdoor-quality: ~800 ft²/hr *
 - indoor-quality: ~400 ft²/hr *
- High reliability for high printer up-time
 - HP Latex Inks and HP Wide Scan printheads were developed together
 - HP Wide Scan Printheads are user-replaceable
 - Printheads are automatically tested and serviced

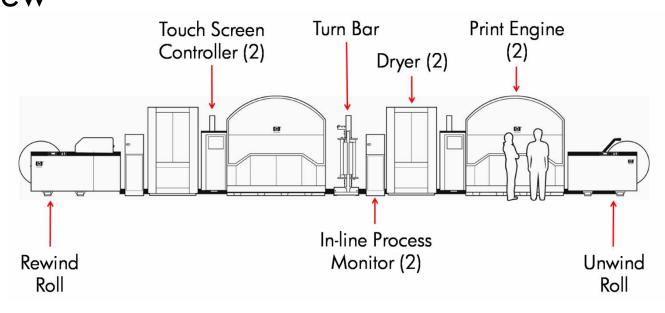


*outdoor-quality speed based on printing in 2-pass unidirectional print mode; indoor-quality speed based on printing in 4-pass unidirectional print mode.

HP Inkjet Web Press



HP Inkjet Web Press



- Prints a 30-inch web at speeds up to 400 feet/minute
- 600 dpi, duplex 4-color printing
 - HP Bonding Agent for uncoated stock
- Uses HP's 4.25-inch SPT-based printheads
- Fault-tolerant design
- In-line process monitoring
- Raster image processing and process control at full press speed
 HP Blade Server-based controllers



HP Inkjet Web Press built on HP's Core Technologies: Print + IT



Moore's Law for Printing

- Scalable Print Technology
 - Fault tolerance
 - Load balancing

Moore's Law for IT

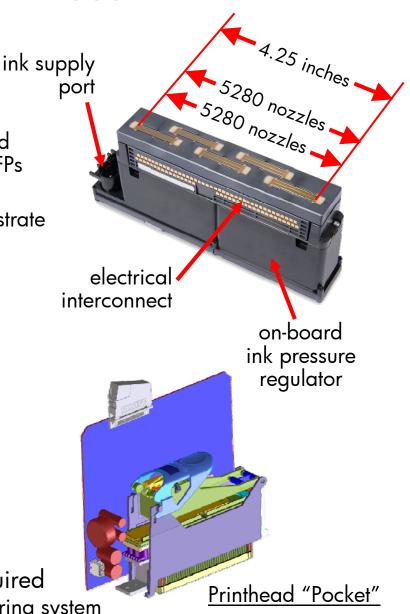
- Scalable blade servers
 - Fault tolerance
 - Load balancing





HP Printheads for Web Press design details

- Printhead Module
 - 5 HP Thermal Inkjet die
 - core technology and production leveraged from HP Retail Photo Kisoks, MFPs, and LFPs
 - precision die-to-die alignment
 - dies mounted on a flat, rigid ceramic substrate
 - 1,200 nozzles per inch
 - 2 columns of 5,280 nozzles each
 - 10,560 total nozzles per color
 - built-in fault tolerance
 - 4.25-inch (108 mm) print swath
 - up to 24K drops/sec/nozzle
- Snap-in/Snap-out design
 - printhead is user-replaceable
 - fully-modular printhead pocket
 - mechanical registration and lock-down
 - electrical connections
 - ink supply connections
 - no manual mechanical adjustments required
 - fully-automatic with in-line process monitoring system

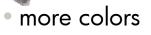




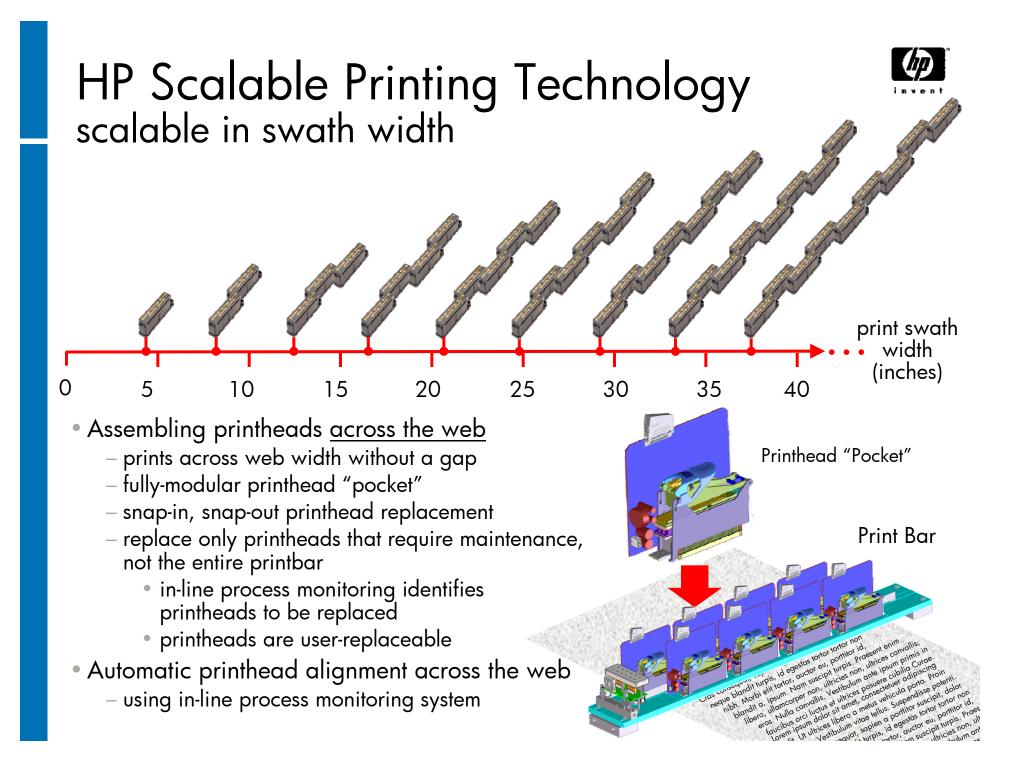
HP Scalable Printing Technology scalable in performance

Where can HP take SPT technology in an inkjet web press?

• wider print swath



- media versatility
- increased fault-tolerance
- higher web speeds





web feed

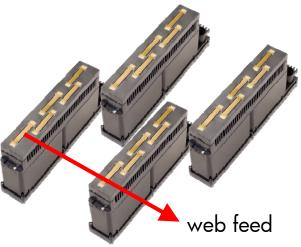
HP Scalable Printing Technology scalable in performance and features



- color options and media versatility
 - monochrome
 - monochrome + bonding agent (F) on uncoated media
 - color configurations: 4-color, 4-color + F
- -tandem printheads
 - higher web speeds
 - improved fault-tolerance
- Automatic printhead alignment along the web
 - using in-line process monitoring system



HP Scalable Printing Technology tandem architecture



- Multiple nozzles per color address each 1/600" dot row
- Improved fault-tolerance
 - in-line process monitor automatically detects weak or missing nozzles
 - self-correcting: good nozzles automatically replace weak/missing ones
- 2-pass quality in single-pass printing
- Higher web speeds
- Lower printhead duty cycle for longer service life

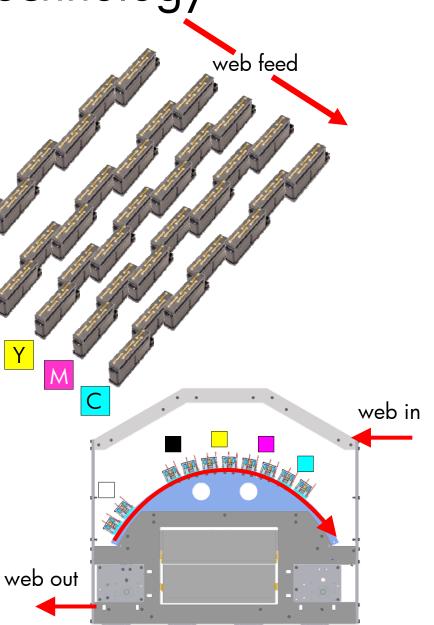


HP Scalable Printing Technology writing system

• Web speed up to 400 feet/minute

• 600 dpi

- Example configuration:
 - C M Y K + Bonding Agent (F)
 - tandem printbars
 - ~70,000 active nozzles per color
 - 7 printheads on each printbar
 - 70 printheads
 - 2-pass print quality in a single pass F
- Arched paper path
 - paper tensioning
 - paper positioning
 - printhead-paper spacing
- In-line dryer for each print array
- In-line process monitoring
 - fully-automatic print quality measurement and performance control



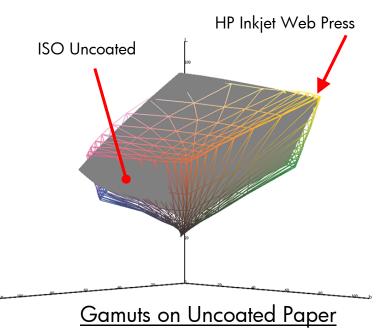
HP Pigment Inks uncoated paper performance

- Water-based ink formulation
 - extremely low VOCs
 - no ozone, no hazardous air pollutants*
 - no ventilation required to manage occupational exposure to VOCs**
 - non-flammable and non-combustible
- Inks work with HP Bonding Agent on uncoated papers
- Compared to Euroscale Uncoated gamut:
 - better black optical density
 - -larger color gamut
- Durability
 - smudge-resistant
 - water-resistant
 - highlighter-resistant
 - suitable for direct mail and book production

* No ozone products expected based on ink composition and printing technology; HAPs per US Environmental Protection Agency Method 311.

** Special ventilation is not required to meet US OSHA requirements on occupational exposure to VOCs from HP Latex Inks. Ventilation equipment installation is at the discretion of the customer—no specific HP recommendation is intended. Typically no air discharge permitting is required with inks that emit extremely low VOCs.







Bonding Agent features and benefits

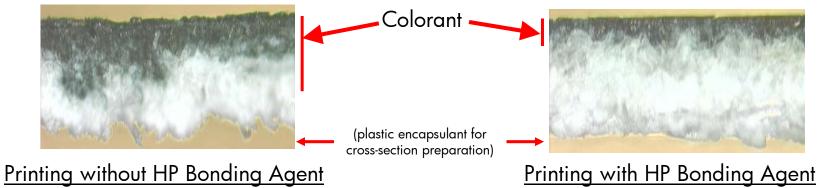
- Printed only where ink is applied
- Chemically reacts with HP pigment inks
 - effectively gives coated paper performance
 improves image durability
- What it does:
 - controls ink penetration
 - controls dot spread
 - reduces strike-through

Colorant penetrates into paper

- improves print optical density
- reduces feathering



Microscopic Cross-sectional Views of Uncoated Paper



Colorant remains near the surface and binds to the paper

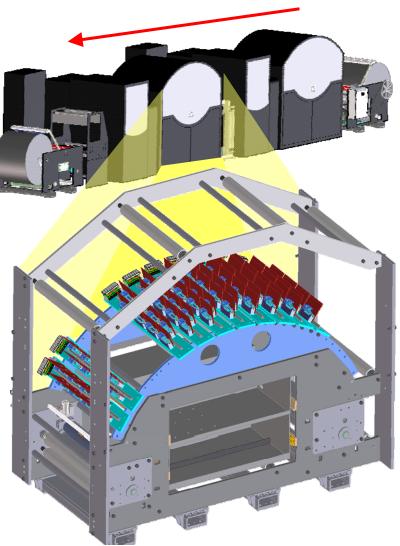
Image Source: HP R&D



HP Inkjet Web Press Technology writing system module

- Built-in ink filtration and degassing systems
- Arched paper path stabilizes paper moving through the print zone

 reduces effects from wet cockle
 controls printhead-paper spacing
- Automatically moves printbars into printing and servicing positions
- Built-in printhead service stations
- Ink aerosol management



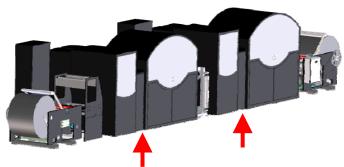


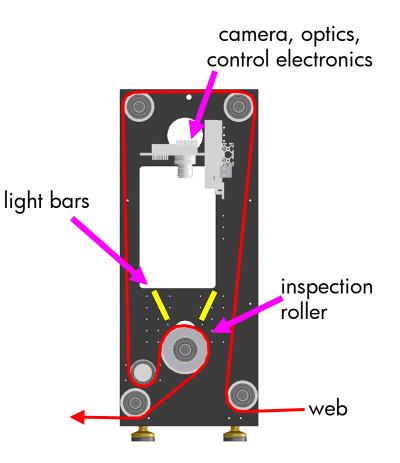
In-Line Process Monitoring Module features

Installed in-line after each print engine

• Synchronized with print engine controller

- for test pattern type and location
- RGB LED light bars
 - illumination is synchronized to color of test pattern for maximum image contrast
- Calibration and operational feedback
 - -document content verification
 - closed-loop color calibration
 - matches desired output tone response
 - optical density uniformity across the web
 - nozzle-to-nozzle alignment when one or more printheads are replaced
 - within a primary and color-to-color
 - individual nozzle health
 - dot presence and placement
 - on-the-fly nozzle check
 - print quality acceptability
 web width and position verification



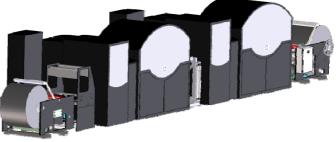




Take-away Messages

- HP's Scalable Printing Technology extends HP's core inkjet technologies into industrial printing solutions
 - industrial solutions benefit from HP's manufacturing expertise and economies of scale
- With SPT, HP's Inkjet Web Press offers performance scalable in features, speed, and web width
- HP pigment inks and bonding agent give coated paper print quality on uncoated stock
- In-line performance monitoring and control assure consistent performance and fault-tolerant web printing





Thank you

