

INTERGRAF

European print market trends

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Content .

Who is Intergraf ?

Profile of the European
print industry

2020 disruptions

Post-pandemic print
market



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Intergraf 2020 Economic Report.

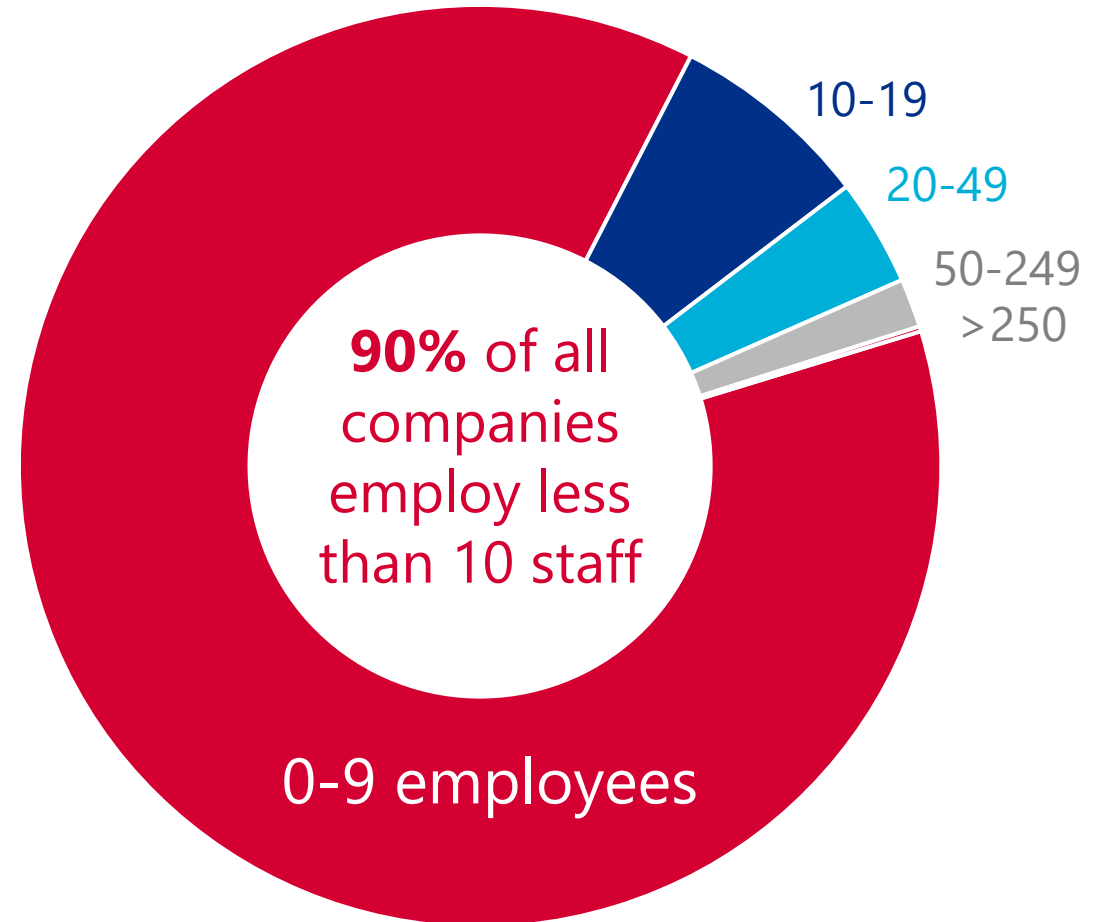


European print market.

 **110.000**
COMPANIES

 **600.000**
EMPLOYEES

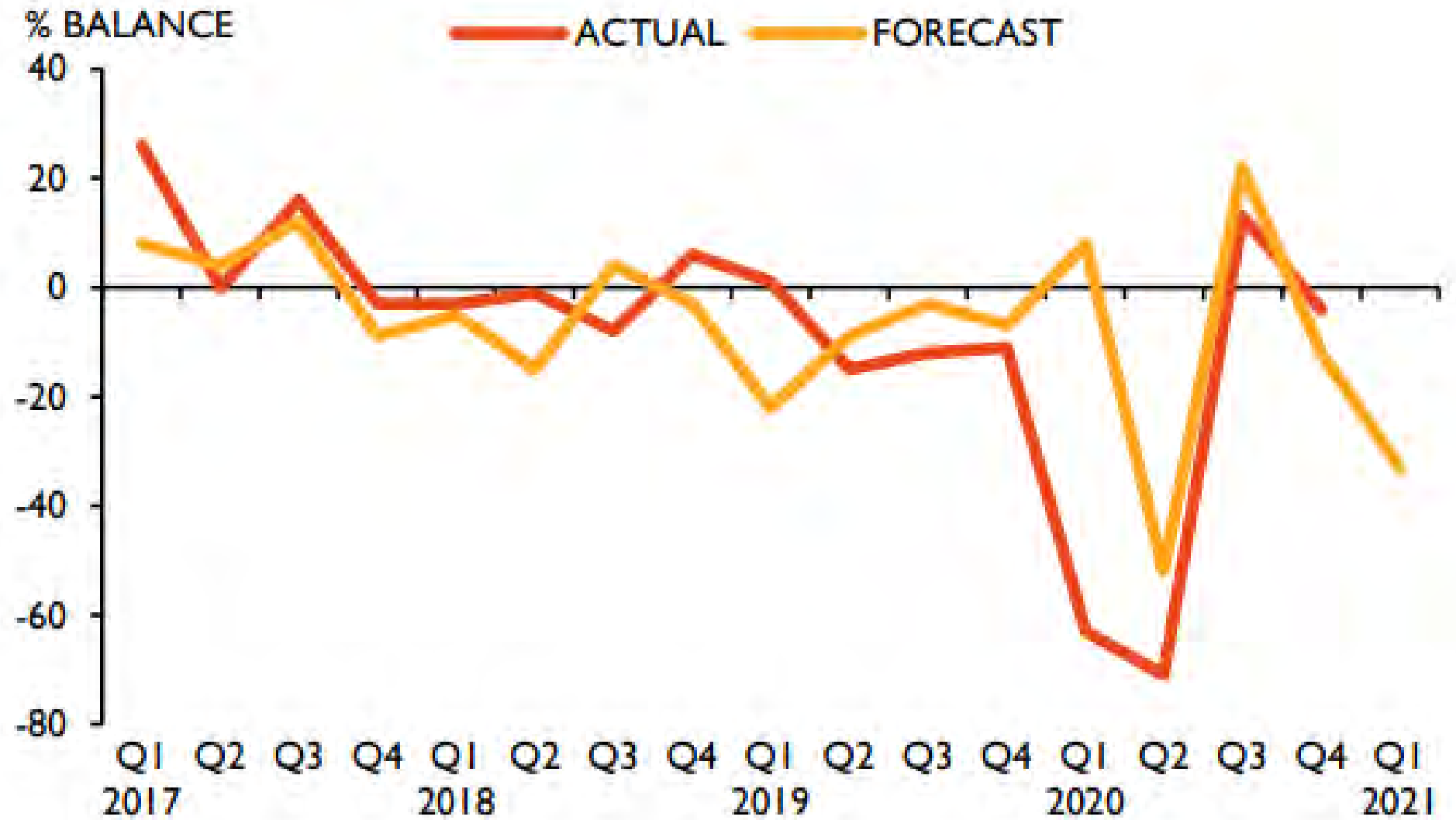
 **80 billion**
TURNOVER



Number of employees /
Number of companies by size



UK printers confidence in general state of trade.



Source: BPIF Printing Outlook

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FLYER ALARM

☰ 🔍 🔔 1 👤 ✉️ 🛒
Menu Search Notifications Customer account Contact Shopping basket

All sales suspended from 15th February 2021

Dear customers,

The consequences of Brexit mean that we are facing considerable difficulties in delivering products. For this reason, we have decided to suspend all sales from 15th February 2021. Any orders placed before this date will be produced and shipped as usual. In the mean time you will be able to access your customer account and order history as normal via our online shop. If you have any questions, please do not hesitate to contact our customer support team.



2018

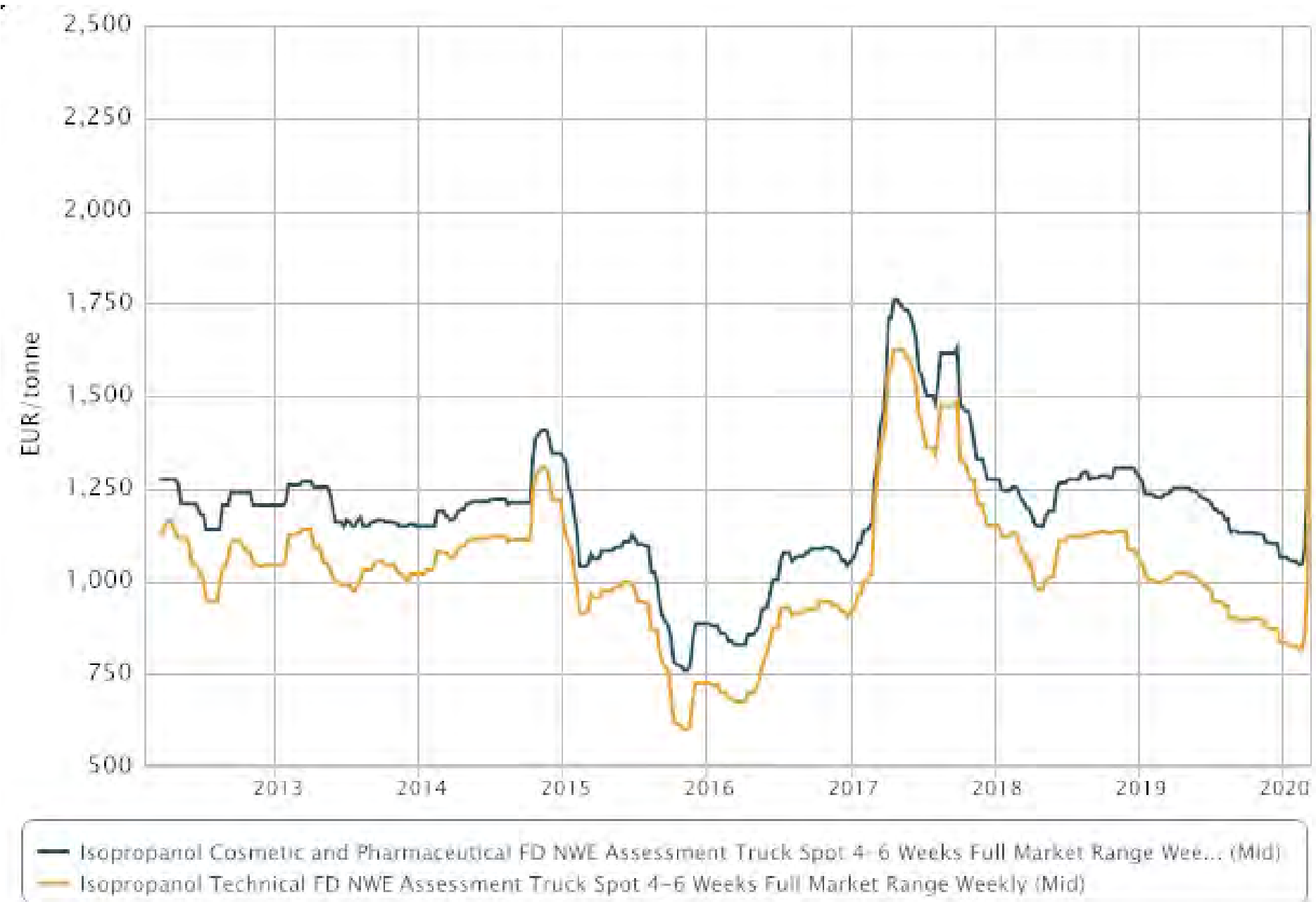
2019

COVID-19

2021

2022

Short term impact on IPA.



Source: ICIS, 2020

Intergraf advocacy.



ALERT COVID-19 Risk of ethyl alcohol shortage for the production of food packaging

18 March 2020

Under these exceptional circumstances, the priority is to secure business continuity for the supply of consumer goods that are vital for the population. Food is one of them.

It is key that the supply of food to the European population is safeguarded and therefore any disruption to the supply chain has to be avoided.

The European printing industry therefore warns about the already experienced shortage of ethyl alcohol by certain companies. Ethyl alcohol is a critical input material for the production of printed packaging material¹ and therefore for the production of food packaging. Without packaging, food cannot reach the final consumer.

Ethyl alcohol is also used for the production of disinfectants, which demand has significantly increased with the spread of COVID-19. While the supply of ethyl alcohol should be secured for sanitary purposes in particular in medical environments, its supply for the continuous production of food packaging should also be available.

We urgently call on European and national authorities to secure the supply of ethyl alcohol for the continuous production of food packaging.



INTERGRAF STATEMENT Intergraf demands that print be defined as an 'essential service' in COVID-19 crisis

26 March 2020

Amid the spread of COVID-19, governments across the EU have taken the decision to define the essential services that must be maintained during the lockdown to fight the virus and ensure society continues to function.

The production of goods and services deemed non-essential are therefore curtailed or stopped altogether in a bid to prevent the spread of the disease. They may also be denied access to raw materials to continue production as we currently face the situation with the access to synthetic ethanol and isopropanol used in the printed food packaging industry¹.

Intergraf calls on authorities at national level to recognise printing as part of the essential services. If the printing industry is not permitted to function as usual and denied financial assistance, access to raw materials or other support, authorities risk that indispensable products are not produced.

Printing of food, hygiene products and medicines

Printers producing printed food packaging are more crucial than ever as supermarkets come under increased pressure to make sure shelves in shops are kept full for consumers. The same applies to hygiene products. Pharmacies must be guaranteed an uninterrupted supply of medicine, the packaging of which is also printed by our industry. Avoiding disruptions to key value chains must be prioritised. And the communication of public health information should not face any restrictions.

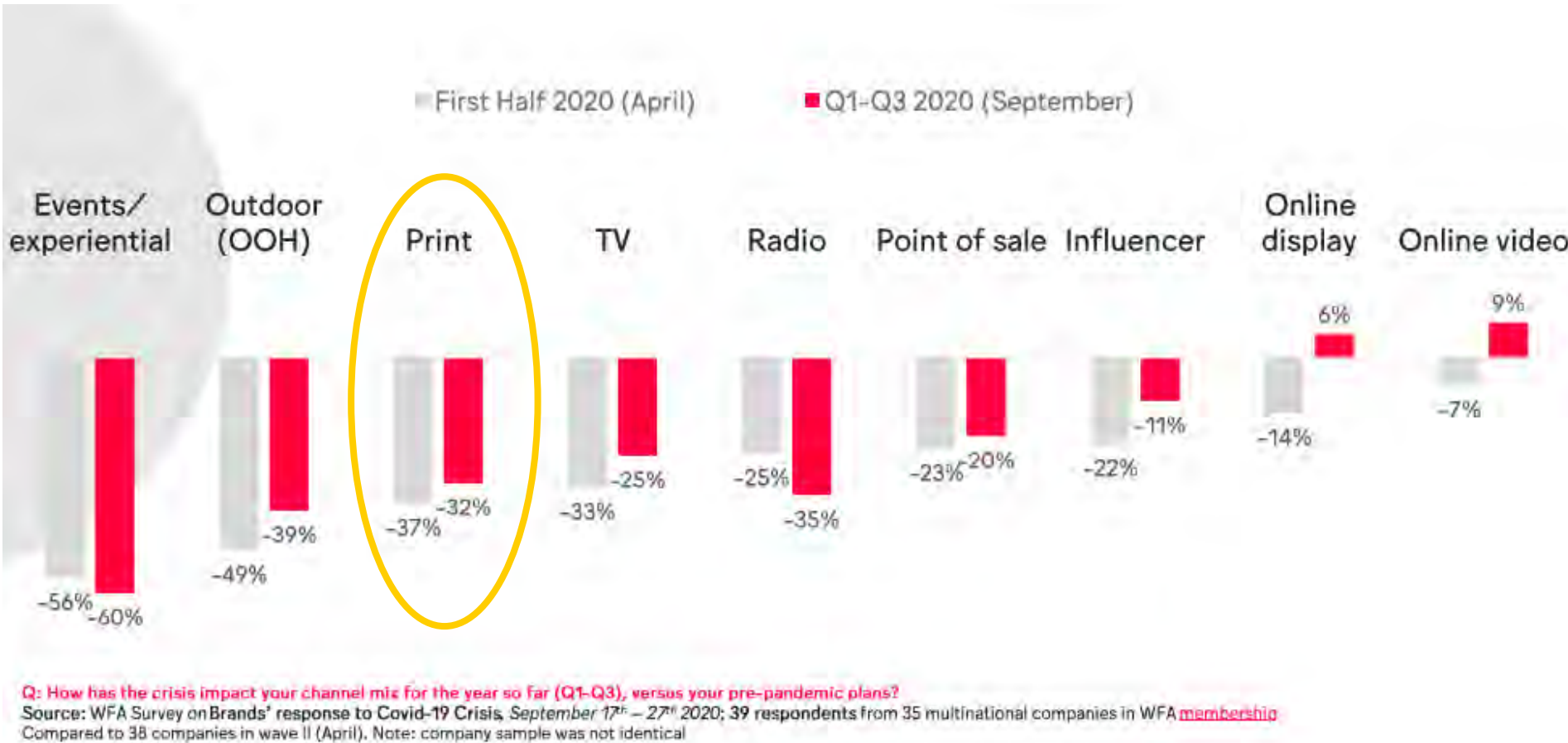
Printing of labels, posters and folders

Labels, posters and information-folders are very important communication tools, to give clear and barrier-free information to citizens and to explain important measures and to help to avoid direct contact at critical places and structures.

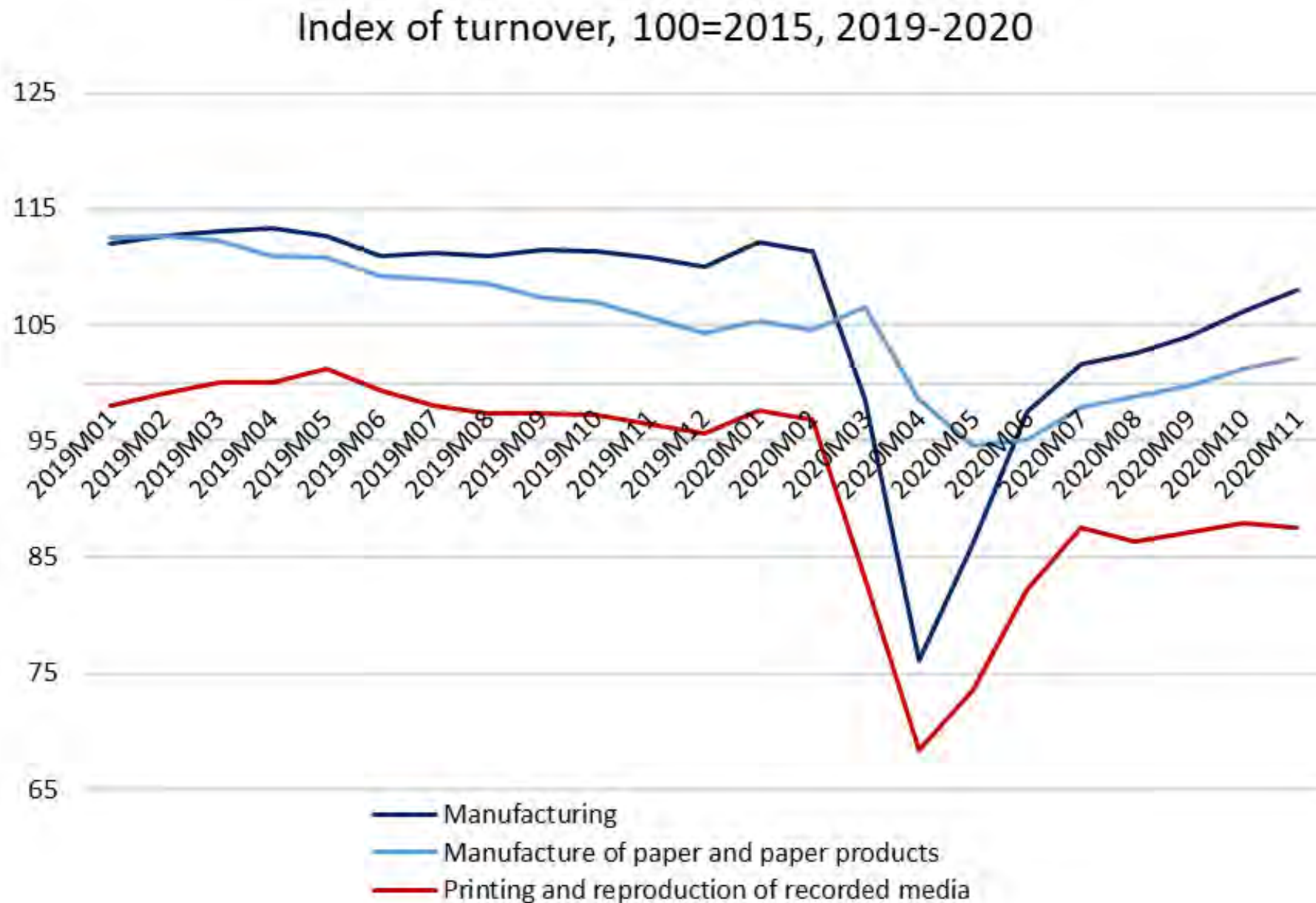
Printing of newspapers

Similarly, concerned citizens rely on daily news to keep themselves informed about the virus.

Impact of pandemic on advertising.



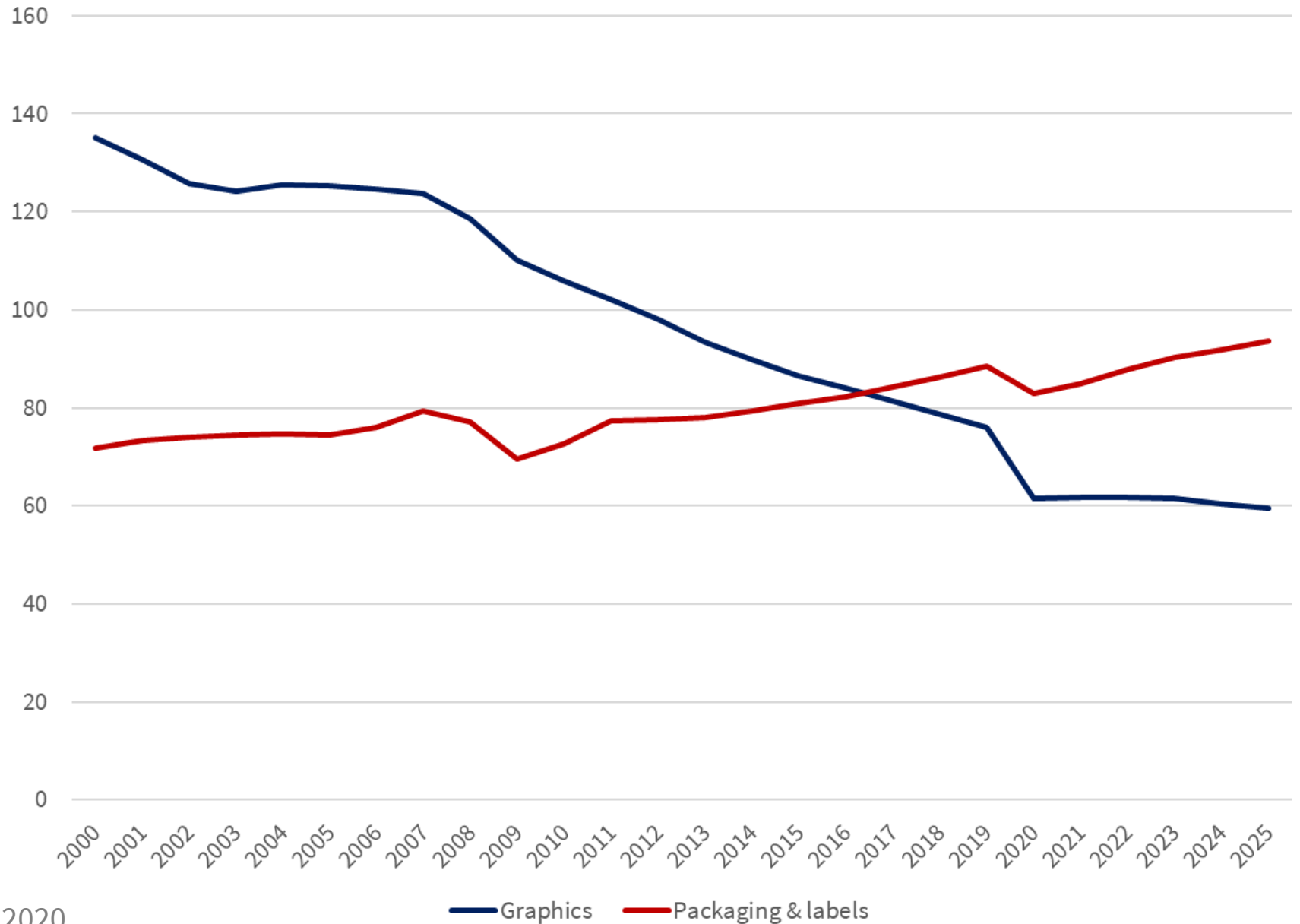
Impact of pandemic on print.



Source: Eurostat, 2021

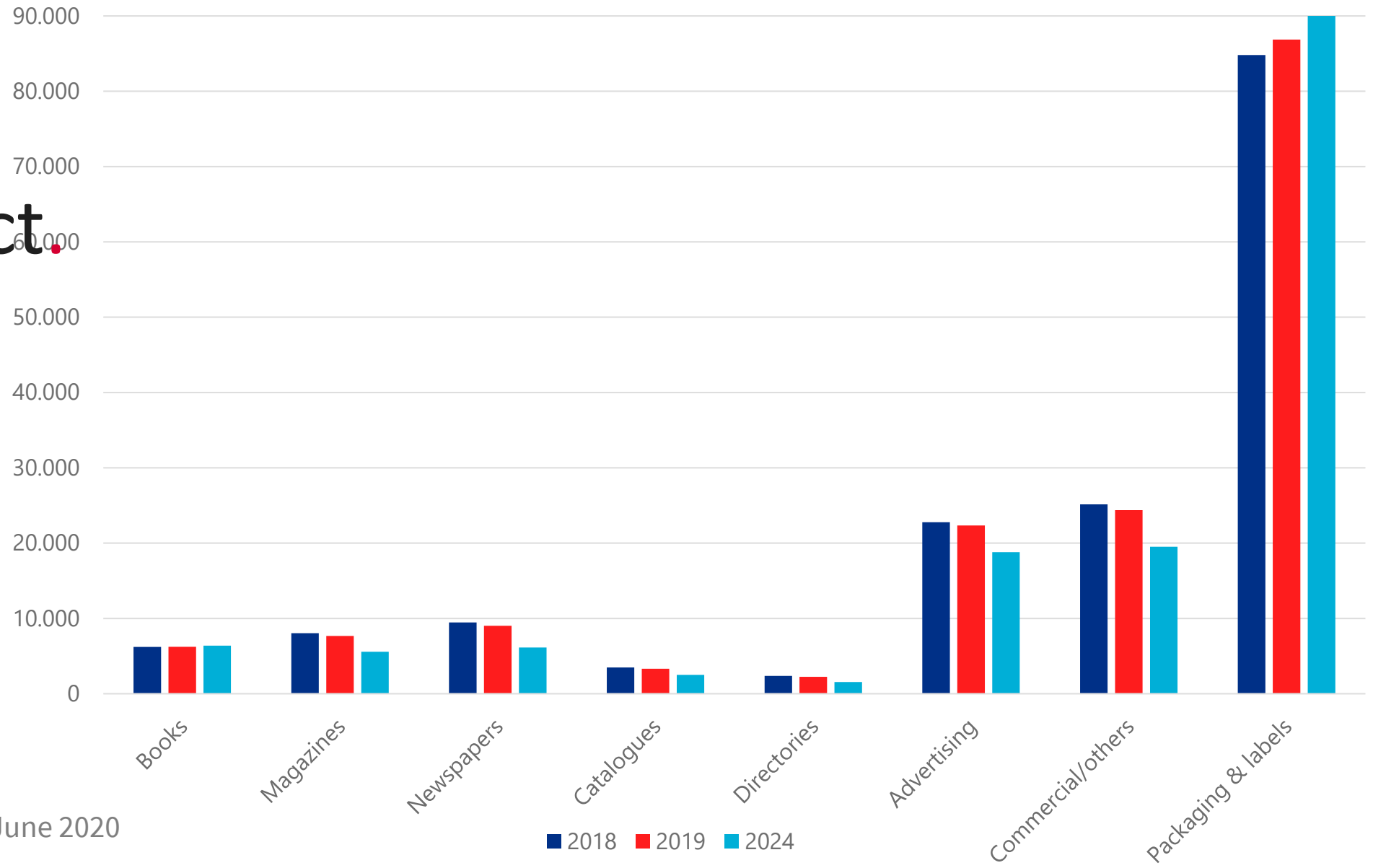
Print market post-pandemic forecasts.

Trend in European printing & printed packaging output, 2000-2025 (€ billion, constant 2019 prices & exchange rates)



European Printing & Printed Packaging Output by Print Product, 2018-2024f
(€ million, constant 2018 prices & exchange rates)

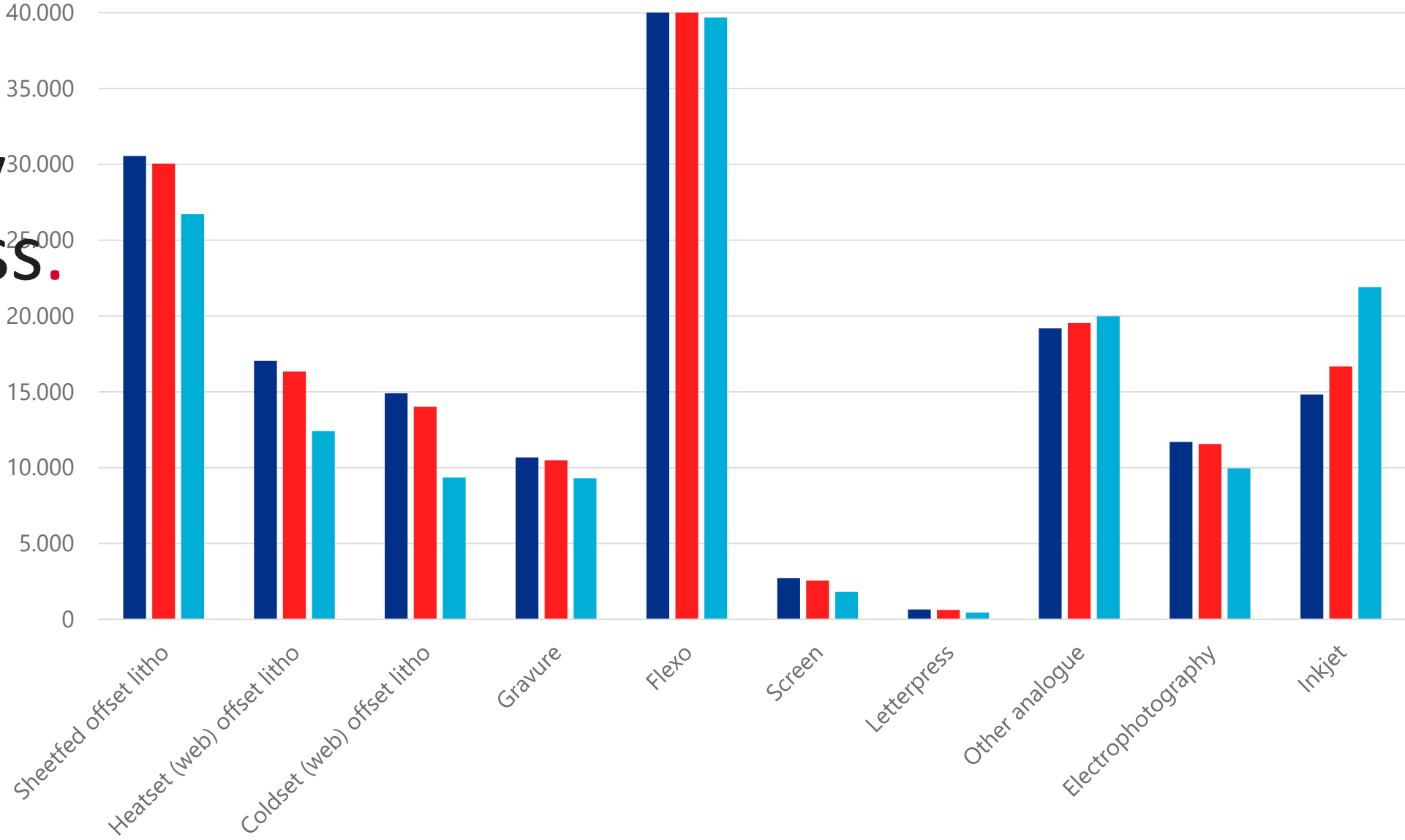
Turnover by print product.



Source: Smithers for Intergraf, June 2020

European Printing & Printed Packaging Output by Print Process, 2018-2024f
(€ million, constant 2018 prices & exchange rates)

Turnover by print process.



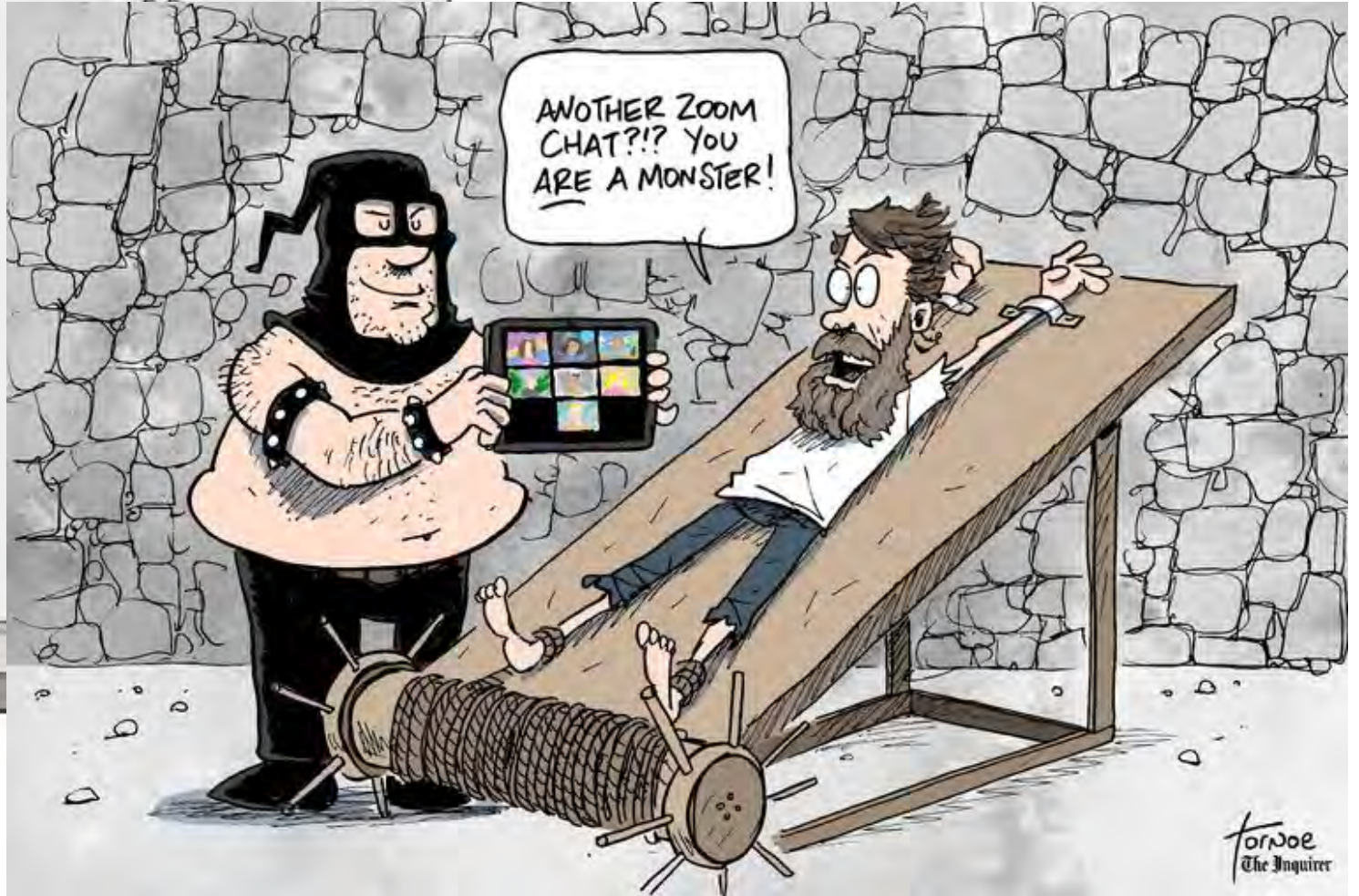
Source: Smithers for Intergraf, June 2020

■ 2018 ■ 2019 ■ 2024

Post-pandemic print market.



Post-pandemic print market.



THANK YOU FOR YOUR ATTENTION

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