



G A I N

graphicartsintelligence**network**

The European Printing Industry Report

**Research and Publication by
GAIN (Graphic Arts Intelligence Network)**

**VERSION 2009
(including evolution from 2005 and 2013 forecast)**

printed products
printing processes
consumables

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PRELIMINARY NOTES TO 2009 VERSION

This is an updated version of the European Printing Industry Report issued in 2005 by GAIN.

We have introduced a number of main improvements, basically the comparison of the 2009 data with the data corresponding to 2005 and a projection to the data that may exist in 2013, taking into account the present evolution and the influence of the new factors such as the poor economy, the influence of competition from the Far East and the development of new technologies, specially in the area of digital printing.

Furthermore, we have included this time more Western countries, such as Portugal and the ones in the Scandinavian region, with its four countries, Denmark, Sweden, Norway and Finland.

Bearing in mind the possible influence of the stated factors in the pricing of both products and processes, we have concentrated the effort in the volumes instead of the prices.

In terms of products, we have reclassified some of them, mainly in the areas of labels and forms and we have withdrawn photographic film from consumables, understanding that there is no much interest on this part of the supplies.

In terms of our view of the evolution during the next four years, obviously, we have taken into account all the previous trends in terms of products and processes but, in a special manner, we have introduced the influence of the present poor economic climate.

Obviously, this influence can not be spread with the same annual rate during the next four years. Due to this, to give a better view of the annual rate during the next four years, we could take, for example, the evolution of the growth in sheetfed offset printing as per the following compound growth per year during the next four years:

Annual growth from 2009

	Year	Accumulated
2010	1,4%	1,4%
2011	2,0%	3,4%
2012	2,4%	5,8%
2013	2,7%	8,5%

Finally, we have also included crossed information about processes and products in order to have supplementary data in terms of which processes are being used for each printed product in terms of share.

We hope that this new version becomes useful to the companies and professionals that work in the environment of the printing industry and we invite you to send suggestions for improvements for whenever the new version has to be issued.

In fact, GAIN members in Europe are continuously updating information about the market statistics and trends and, so, we can provide complementary information and new surveys on request.

1. Forward

GAIN (Graphic Arts Intelligence Network) is an association of European consultants that are dedicating all their activities to the printing industry in all its specialities to provide services and information to the companies and professionals within that market segment.

GAIN has been collecting information about the different products, processes, equipment and consumables since its beginning about 25 years ago. Nevertheless, after dedicating three years to prepare the version 2005 of our European Printing Industry Report, we have now been concentrated on preparing the present updated document realising that there is in the market no other publication yet that covers in such a depth and width the European printing industry facts with the influence of the present world-wide situation of the economy.

In order to obtain all the contents, we have been using many sources of information, mainly our own experiences in each country and during our entire individual career. But our knowledge of the market and the processes were put on the consideration and we were contrasting with other sources and we identified the largest differences and we searched for the true facts.

Furthermore, we applied our knowledge about the processes and the relative consumption and usage of presses, consumables, etc. to establish the statistical relationship between them and, also, between countries with their own characteristics to find the most reliable figures and trends.

During our consultancy work for printing companies and printing industry suppliers, we continuously organise research programs by means of questionnaires to users that bring information and data that have been put in the same basket to further complement or do a fine tuning of the information already prepared.

Therefore, we think that this is the report with best and most coverage of this particular Western European communications industry segment.

We have organised each content dealing first about printed products, in most of their specialities, divided by the printing processes that currently are used to produce them.

Afterwards we have analysed, one by one, the main printing processes that are used in each country and, finally, we have included the usage of the main consumables that are participating in those printed products and those printing processes.

Bearing in mind the participation of each printing process within the total printing industry activity, it is obvious that the offset process has been considered with the most details but all the processes have been included with some emphasis on the known technologies. We have given some importance to the influence between processes and what this may mean in the future trends.

So, each reader, being a manufacturer or a user, can find in this pages the relative importance of his / her speciality or product in each country, the influence that are being received from other processes or trends, the growth that can be expected within the next few years, the users views on new technologies, etc.

- Bearing in mind the need to offer a report that is updated, we have given preference to timing than to perfection in the way that we describe the facts in a proper English. So, understanding that the reader also appreciates the quick reception of the information, we apologise for any mistakes or lack of correctness of the expressions in English.
- Within that context, when expressing data in terms of figures, we have adopted the Continental European way of using decimal point or comas and thousands points or comas, and we have decided to adopt the coma as a decimal notation and a point for thousands. We hope this is properly understood.
- Also, we have adopted the European English for expressions like “colour” and “labour” instead of the American version “color” and “labor”.
- We hope that the reader will appreciate the fact that, being this report that has been elaborated during a period of time, during the last three years, and in spite of a recent revision of figures having done, there may be still a few deviations due to the constant evolution of data and facts. In any case, the essence of the trends and volumes are totally valid.

We hope that this document will be useful to you. We will continue searching and reporting about the European market in order to be able to complement and update this information whenever is required in the future.

GAIN members