



INTERGRAF ACTIVITY REPORT

2018-2019

Your European federation for print and digital communication



Representing
the European printing industry



Lobbying
European Institutions



Informing
about industry developments



Networking
between industry experts

Foreword



Cees Verweij, President, and Beatrice Klose, Secretary General

The European graphic industry in the EU28 has an annual turnover of **€79.5 billion**, according to the latest statistics. This is generated by approximately **112,000 companies** employing some **625,000 people**. Print makes up a substantial portion of Europe's manufacturing sector and remains an important industry across the continent. It is thus essential that such a sector is well-represented at European level. Intergraf is your European federation for print & digital communication and the face of the graphic industry in Brussels.

Over the past year, we have worked towards supporting the sector in a multitude of ways. For example, we have organised large conferences - such as **Print Matters for the Future** in Milan and **Packaging Conference 2019** in Brussels - as well as many smaller meetings to benefit printers and related industries. We have represented the sector at the **European Institutions**, ensuring that members' views are taken into account by EU policymakers. We have acted as the sector's eyes and ears in Brussels, informing stakeholders about all **relevant policy developments**. We have published market reports - such as our **Annual Economic Report** and **European Printed Packaging Market Report**. We have communicated the most crucial **economic and industry developments**. We have represented employers in **European Social Dialogue** discussions. And we have worked with related sectors to

promote print, such as through the **SPPRING** project, **Two Sides** and **Keep Me Posted EU**. We have also promoted the sector to students across Europe with the first edition of the **Intergraf Student Award**, which celebrated excellence in print media research in 2018.

None of these achievements would have been possible without the support of Intergraf members. The knowledge and experience members bring to our Board, Steering Committee, Working Groups, meetings and day-to-day work is crucial and we are always grateful for this input.

Intergraf has certainly had a busy year! At all levels, we have achieved a lot during 2018-19 of which we can be very proud. A particularly noteworthy achievement was the launch of our **new logo, corporate image and website**. These tools have allowed us to improve not only the look and delivery of our communications, but also the content. With the **European elections** at the end of May 2019 and further improvements to our services planned, we are already looking to the future and are well on the way to carrying the momentum into the next year.

To Intergraf members: thank you for all of your hard work this year. We look forward to another year of excellent collaboration!

Cees Beatrice



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INTRODUCTION



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EVENTS COORDINATED

15

PRESENTATIONS GIVEN

16

NEWSLETTERS PUBLISHED

100+

MEETINGS / EVENTS ATTENDED

EU AFFAIRS



EU Affairs

2019 European Elections

At the end of May 2019, citizens from all over the EU will vote for their European Parliament representatives. A new European Commission President will also be appointed, leading the next policymaking mandate from 2019-24. These changes will result in an updated Commission Work Plan, including new policy priorities, as well as many new MEPs representing a Parliament with a different balance of political groups. The EU elections offer a great deal of opportunity for our sector to re-shape the political agenda.

2019 will be a crucial year with regard to EU policy because of the European elections. With new European Commission priorities due to be published before the end of the year, as well as a high number of new MEPs joining the European Parliament over the summer, there will be considerable opportunity to promote the printing industry to EU policymakers and institutions.

It is important for Intergraf to cut through the noise at this busy time to ensure that the graphic sector is visible. For associations like ours, this is one of the most crucial periods of time for lobbying actions. As such, various actions are currently being planned, and some have already taken place. Pro-print campaigns and networks such as the Print Media Group and the Keep Me Posted EU campaign are particularly useful tools for promoting our message, since they have a multi-sectoral approach, with support from various related industries and citizen groups.

At the beginning of 2019, Intergraf carried out our first lobbying action in

preparation for the new legislature. In cooperation with the paper industry, postal operators and envelope manufacturers, we distributed a "Will you be re-elected?" mailing (see photo on opposite page) to all current MEPs. The mailing contained a flyer entitled "Print will make the difference in your EU election campaign", which presented three key pieces of data about the benefits of print for policymakers:

1. "Communication campaigns including print are 67% more effective than those without"
2. "Adults read their letter mail on average for 22 minutes a day"
3. "60 million Europeans have still never used the internet"

Future actions will build on these messages to further promote our sector. Where necessary, Intergraf will continue to work with other sectors and associations to get our message across in the most effective way. Individual actions are also being planned to help ensure that print is firmly on the agenda of the new Commission and Parliament.



"Intergraf is working on various initiatives which will be launched after the elections. As well as remaining in contact with European Commission officials following the publication of the Commission's new Work Plan, we are also preparing to contact all MEPs - both new and returning - with a pro-print message to welcome them to their new mandate in Brussels. We know that print is an important sector in Europe and we are working to ensure that the new European legislature does too."

Beatrice Klose, Secretary General of Intergraf



Laetitia Reynaud, Policy Adviser at Intergraf

With the upcoming European elections, the Juncker Commission rushed to present its final **policy proposals** by the end of 2018 - the latest being the proposal on single-use plastics, which the Commission managed to finalise in early 2019. After this, the current Commission did not present further major policy initiatives, including on the review of the timber Regulation or on a proposed Regulation on printed food contact materials. However, discussions on **technical issues**, i.e. on industrial emissions or the review of the EU Ecolabel for printed products, have not been impacted by preparations for the elections.

Both the **Environment Working Group** and **Economic & Statistics Working Group** have had busy agendas this year. In addition to working on EU policy issues, the Environment Working Group has for instance initiated the project of a roadmap for good manufacturing practices in printing. Its purpose will be to give guidance to printers when it comes to printing for specific

applications, including, food contact, medical, toys or cosmetic. The added value of Intergraf's Working Groups also includes sharing and discussing national developments - the impact of Brexit was for instance an unavoidable agenda item for the Economic & Statistics Working Group. I would like to thank the members of both Working Groups for their precious contributions to the policy work of Intergraf.

Our advocacy work is also supported by **strong networks** which Intergraf has built over time. These include, for instance, collaboration on chemicals, solvents, paper recycling, packaging inks and forest-based industries, as well as media-related issues.

Intergraf creates and maintains **Policy Factsheets** on most policy issues. These are all available for our members. Our **Working Groups** are also open to all interested members. In addition, I can always be contacted directly with questions about all economic and environmental policies impacting our sector.

Key policy highlights from 2018-19:

- Worked on the harmonisation of print and digital taxation
- Argued against limitations to advertising
- Monitored implementation of data protection legislation
- Provided information on production costs evolutions
- Advocated for workable solvent emissions requirements
- Lobbied for applicable criteria on the EU Ecolabel
- Prepared for upcoming printed food contact material legislation
- Advocated against challenging restrictions on certain chemicals

EU Affairs

Competitiveness

Print & Digital Taxation

As of December 2018, Member States have been allowed to apply the same reduced VAT rate for e-books and digital press as they do for printed books and press. Already thirteen countries have harmonised the rate for both mediums. The key concern of Intergraf during the legislative process was to maintain the reduced rate applicable to printed products.

Intergraf is also monitoring the broader review of the European VAT system. It will generally provide more flexibility to Member States to apply reduced (including 0%) rates.

Data Protection

The European General Data Protection Regulation (GDPR) has been applicable since May 2018. Intergraf has provided members with guidance to allow for a better understanding of the legislation; in particular, how printers should read the legislation. The European Commission has the task of reviewing the legislation by May 2020. Moreover, guidelines are expected on

the concepts of data controller and processor, as well as on the notion of legitimate interest of the data controller. These are developments that Intergraf is monitoring.

Printed Advertising

Printed products in several countries are experiencing regulatory pressure based on environmental grounds. This is particularly the case for printed advertising - specifically direct mail and doordrops. In some countries, pressure takes the form of taxation, while in others it takes the form of the implementation of an opt-in system to receive unaddressed advertising. Furthermore, extended producer responsibility schemes are in place in some countries, whereby fees related to the placing on the market of graphic paper are modulated by the design of the product. This is an area which is increasingly being monitored by Intergraf to support our members by providing relevant environmental, economic and legal arguments against abusive regulatory pressure towards printed advertising.



“Pressure on production costs has significantly impacted the sector over the past year.

Graphic paper has registered increases in prices and we are providing monthly updates on the situation. In particular, we are monitoring pulp prices. Increases in pulp prices are one of the explanations for the situation, but not the only one. Some graphic paper mills have converted to packaging grades, leading to a decrease in capacity of certain grades. Availability of newsprint in the last months has also been a worrying issue for printers in Europe.

Unfortunately, these developments come at a time where other commodities are also experiencing price increases. This is for instance the case for printing plates and inks.

It is useful to convey the nature of this situation to print buyers to encourage more acceptance of knock-on price increases in printing services.”

Laetitia Reynaud, Policy Adviser at Intergraf

EU Affairs Environment



EU Ecolabel visit of officials from the EU Joint Research Centre to Burda Druck, Germany, June 2018

Chemicals

Chromium trioxide is a chemical substance now listed as a substance requiring authorisation for its industrial use. Gravure printing requires the production of cylinders that are produced in a galvanic process using chromium trioxide to generate the required hard chrome layer. To date, no technically realistic alternative to chromium trioxide is available for the gravure printing industry. The process to gain authorisation has been ongoing for several years, reaching the political level in the past year. Intergraf called on the European Commission and Member States to grant authorisation by demonstrating the safe use of the substance by gravure printers and informing about the impacts on other sectors, including publications, packaging and decorative printing.

Restrictions are also being considered for titanium dioxide, with a possible change in classification pending. Titanium dioxide is the most widely used white pigment. Intergraf is part of an industry alliance which aims to demonstrate that the hazard does not come from the substance itself, but from its dust form.

Solvent Emissions

Large heatset, gravure and flexographic printing plants are users of solvents and are therefore subject to the European Industrial Emissions Directive.

The detailed operating conditions, descriptions of best available techniques and related emission limit values are set in the STS BREF (Best Available Techniques Reference Document on Surface Treatment using Organic Solvents). The highly technical process has been ongoing since 2015 and this year Intergraf dedicated time and resources to the revision process for heatset. Despite an inevitably increased ambition demanded by policymakers, we secured maintaining reasonable and workable permit conditions. The final steps of this revision process will take place at the end of 2019.

EU Ecolabel

The European Commission is increasingly focusing on product policy and thereby energy and environmental labelling of products. The EU Ecolabel on printed products has been available since 2012 and covers approx. 130 licences, corresponding to some 300 products. The revision process of the criteria was launched at the beginning of 2018. The Commission requests more ambitious criteria, in particular on recyclability and waste generation. Intergraf organised site visits with EU officials in mid-June 2018. Our advocacy focuses on securing a practical implementation of the criteria in order to allow all printers, including smaller companies, to apply for a licence.

EU Affairs Packaging



“The strong focus by politicians and the public alike on waste and plastic packaging is likely to persist with the new European Commission in the form of sustainability legislation and goals. However, due to the pressure on the EU to create jobs and generate economic growth, it can be expected this will be paired with a renewed focus on competitiveness and making legislation work better for business. It is Intergraf’s role to ensure that further initiatives impacting printers active in the packaging sector are proportionate and fair.”

Annie Scanlan, Membership & Information Officer at Intergraf

Food Contact

With the exception of framework legislation, which sets the basic policy principles for waste and dedicated legislation on plastics, most other packaging materials for food contact (paper, cartons, board, printing inks and adhesives) are not covered by European legislation. Industry has until now had to rely on national legislation or standards. The European Commission has announced a proposal for a Regulation on printed food contact materials, initially expected in 2018, but which has now been delayed by a couple of years. Intergraf is preparing for this legislation together with fellow industry associations active in the food packaging value chain. The key aspect for Intergraf members will be how compliance should be demonstrated to regulators.

produce new guidance for Member States. Similarly, EU rules on essential requirements - the design criteria packaging sold in the EU must meet - are to be reviewed in 2019. As part of Intergraf’s influencing efforts, we are part of the Packaging Chain Forum, organised by EUROPEN (European Organization for Packaging and the Environment). This meeting place of like-minded industry representatives aims to ensure proportionate and fair legislation for the packaging industry.

Single-Use Plastics

The newly adopted rules which aim to reduce the use of certain plastics in the EU, termed single-use plastics, is one of the most significant final initiatives of the current European Commission. The new Directive obliges Member States to implement a ban on products such as plastic plates and straws, and to significantly reduce the use of certain items, including fast food containers. Producers will be subject to stricter EPR schemes, meaning greater responsibility for the clean-up of these items once users dispose of them. Intergraf will actively participate in the follow-up guidance which the European Commission will produce to ensure that printers using these substrates are not overburdened with the new requirements.

Packaging Waste

The Waste Framework Directive sets the basic concepts and rules for EU waste legislation. By 2025, it will be mandatory for all Member States to have extended producer responsibility (EPR) schemes in place for packaging producers. These schemes set out the fees packaging producers are charged, which are differentiated depending on the environmental impact of their product. The European Commission will review this criteria during 2019 and likely

EU Affairs

Social Affairs



“With the adoption of the Joint Statement on Skills at the end of 2018, we have seen some progression this year in European Social Dialogue. Employers and trade unions broadly agree on issues relating to skills, so a unified approach in this area is useful and can be implemented by all parties.”

Fons Bakkes (NL), Co-Chair of the European Social Dialogue Committee for the Graphical Sector

Social Policy

With the introduction of the European Pillar of Social Rights at the end of 2017, there has been an increased focus on social affairs at European level. As this Commission, headed by President Jean-Claude Juncker, ties up their work before the EU elections, numerous social initiatives introduced under the Pillar are in the closing stages of being finalised and adopted.

The European Pillar of Social Rights covers three main areas: equal opportunities and access to the labour market, fair working conditions, and social protection and inclusion. These priorities have been addressed in various horizontal social initiatives (both new and revised), such as the Directive on transparent and predictable working conditions, the Directive on work-life balance for parents and carers, the Regulation on coordination of social security and the European Labour Authority.

As this issue has risen on the agenda in recent years, it is likely that the new 2019-24 European Commission will also continue to focus on the social dimension of Europe. Intergraf will continue to work with BusinessEurope and other sectors in their European Employers' Network to bring you all of the most relevant information.

Social Dialogue

Over the past year, Intergraf has continued to work on various social issues in European Social Dialogue discussions with our trade union counterpart UNI Europa Graphical & Packaging and the European Commission.



This year has been particularly noteworthy because the graphical sector's European Social Dialogue Committee agreed on a new Work Plan for 2019-21. It includes sections on: the technological, social and economic situation and trends of the sector at EU level; digitisation; demographics; skills and follow-up to the 2013/14 joint EU project “Future skills in the graphical industry”; new business models and follow-up to the 2010 joint project on “Best practices in socially responsible restructuring of printing companies”; state aid and unfair competition; and, image and environment.

As well as a new Work Plan, a Joint Statement on Skills was also adopted in the April 2019 Plenary. To continue our fruitful cooperation, Joint Statements on Direct/Unaddressed Mail and reading comprehension on print and digital are also being planned for the upcoming year.

EU Affairs SPPRING Project



Since December 2018, Intergraf has been the coordinator of SPPRING, an EU-funded project focused on skills and recruitment in the paper and paper-based printing sectors: 'Skills for the Paper and Print Industries - Next Generations'. The duration of this project is 18 months, with the project running between December 2018 and June 2020. Our consortium has been awarded almost €800,000 to fulfil SPPRING's objectives.

Project partners and experts from Austria, Belgium, Estonia, France, Germany, Italy, Slovenia, the Netherlands and Portugal are working together to complete this cross-industry project. Six work packages are being followed, which include analysis of current and future skills, education and training delivery pathways and the development of a concrete skills and recruitment strategy and toolkit. This toolkit will include, for example, social media activities, videos and interviews to demonstrate job opportunities, mentoring guidelines, company visits for teachers and career advisors, as well as career days.

So far this year, the bulk of the work

for SPPRING has been focused on the earlier work packages. For instance, the consortium has been carrying out desk research on current skills needs and training and delivery pathways, as well as working on the creation and analysis of a questionnaire, which was distributed to industry stakeholders. The results of this research will help to inform the later work packages.

All outcomes of the SPPRING project will be made available to Intergraf members and the wider industry both during and after the project. We hope that the recruitment toolkit in particular will be of direct use for our members and their member companies.

Intergraf worked hard to win this tender and, as coordinator, we continue to drive the project's deliverables. As well as ensuring that the content of the project is delivered, we are also planning various events to share the results with stakeholders. The first project workshop, for example, will take place on 6 June in Graz, Austria. A further workshop is due to take place on 20 November in Brussels, with the final conference planned for spring 2020 (date and location tbc).



"Recruitment and skills gaps are among the most crucial challenges facing the European graphical sector. This is why Intergraf applied for - and won - funding under the COSME Programme for our employer-led SPPRING project. The 18-month project began in late 2018, so work is now well underway and we look forward to delivering the results of the project's skills research, as well as its concrete recruitment tools, by mid-2020."

Beatrice Klose, Secretary General of Intergraf

CAMPAIGNS

Keep Me Posted EU meeting with Heinz K. Becker MEP (EPP Group, Austria), European Parliament, Brussels, April 2019



Heinz K. Becker, MEP
EPP Group

Campaigns

Image of Print

Intergraf is involved in various campaigns and networks which help to promote the image of print. For example, we are a founding member of Two Sides Europe and the Keep Me Posted EU campaign. We are also a member of the Print Media Group, an informal network representing publishers, printers, paper producers, postal operators, envelope manufacturers, direct mail operators and advertisers. As well as this, we support the Industry4Europe campaign, which promotes the European manufacturing sector to the EU institutions.



Two Sides Europe

Intergraf continues to support Two Sides on their promotion of the sustainability of graphic paper. Structural changes have been implemented to improve the overall campaign at European level, as well as in individual countries. The past year was marked by the visit of international country managers from North America, Brazil, South Africa, Australia and New Zealand to the European Sustainability Group meeting in November 2018. This was a great opportunity to share experience and ideas across borders and continents.

Two Sides continues its activities directed towards companies which engage in greenwashing and make other misleading statements against paper communications. Campaign materials, including the Myths and Facts booklet, are at the disposal of partners who can personalise the tools with their logo. 2019 will see the relaunch of the “Love Paper” campaign, which includes advertising in major magazines and newspapers across Europe. Research will also be carried out over the course of the year to check how the environmental performance of paper is perceived.



Keep Me Posted EU

With the upcoming EU elections expected to result in many new MEPs joining the European Parliament, the Keep Me Posted EU campaign is preparing to re-launch in order to gain the support of new policymakers and continue to influence relevant EU policies.

During the last legislature, Keep Me Posted EU achieved many successes, which the coordinating team hopes to replicate. With a simple, clear message supporting the citizen's right to choose how they receive important information - such as tax forms, election documents, bank statements and invoices - without penalty or extra cost, Keep Me Posted EU is an important and popular campaign. Over 60 MEPs support the campaign, as well as consumer organisations, trade unions, industry and various NGOs representing, for example, carers, older people and persons with disabilities.

The EU campaign also helps to facilitate a transnational exchange of information between national Keep Me Posted campaigns - including organising an annual Campaigners' Day.

COMMUNICATIONS

The European magazine market

While the idea of magazine printing has been in the air for some time, it is only now that the industry is beginning to see a significant downturn in circulation. This is due to a combination of factors, including the rise of digital media and the decline of print advertising revenue. The industry is now facing a significant challenge in how to sustain itself in a market that is increasingly dominated by digital content.

During the last 10 years, the print magazine market has seen a steady decline in circulation. This is due to a combination of factors, including the rise of digital media and the decline of print advertising revenue. The industry is now facing a significant challenge in how to sustain itself in a market that is increasingly dominated by digital content.

However, the industry is not without hope. There are a number of factors that could help to sustain the print magazine market in the future. These include the rise of digital advertising revenue and the decline of print advertising revenue. The industry is now facing a significant challenge in how to sustain itself in a market that is increasingly dominated by digital content.

FIGURE 3: European consumer and trade magazine revenue by media, 2017-2021



However, the revenue from the digital versions of magazines is more than sufficient to make up for the decline in print versions. Many publishers have started significant sums of developing the website and the digital versions of their magazines, and this has been a contributing factor in the decline of new titles of providing magazines. The top of how to increase the content is a major task for most magazines. If they cannot succeed there will be major losses and many more titles will be lost. Both print and digital versions of magazines are expected to grow in the future, but the digital versions will be the main driver of growth. The decline in print versions is expected to be a long-term trend, and it is likely that the industry will be forced to focus on digital content.

The share of print as a proportion of European consumer magazine revenue fell from 85% overall in 2017 to 81% in 2018 and is projected to fall to 75% by 2021. The overall share of advertising revenue is expected to fall from 15% to 12% by 2021. Digital advertising revenue accounted for 4% of consumer magazine revenue in 2017, and is expected to reach 12% by 2021. Digital circulation revenue, standing at 14% in 2017, is expected to reach 15% by 2021. The overall share of advertising revenue is expected to fall from 15% to 12% by 2021. The overall share of advertising revenue is expected to fall from 15% to 12% by 2021.

FIGURE 3: European consumer magazine revenue by media and by type





Alison Grace, Communications & Policy Officer at Intergraf

Over the past year, Intergraf has made a concerted effort to improve our communications - including **rebranding** with a new logo and corporate image, as well as redesigning our website. Intergraf's primary function is to represent our members, so the aim of these actions was to modernise the 'look and feel' of our association to better represent the industry as it is today. We are fortunate to work for an innovative, creative and evolving sector, and our new look now better reflects this reality. We will strive to further improve our communications in order to provide you with the best representation going forward.

Intergraf's monthly newsletter, the **Newsflash**, remains our primary communications tool directed towards members and other associated sectors. Throughout the month, we monitor and review all of the latest developments affecting the graphical sector, before making a compilation and analysis of the main topics for the final publication. To supplement this information, we also send out a bi-weekly internal work review, the **News in Brief**.

Alongside this regular flow of Intergraf

and industry news throughout the year, our flagship publication, the **Economic Report**, compiled by Laetitia Reynaud with input from Smithers Pira, is also made available for members annually. This comprehensive report presents all of the most important data about the graphic industry in Europe. It is supplemented by a quarterly **Economic Newsletter**. The team also prepares detailed **Policy Factsheets** for members on specific EU policy areas. These can be accessed via the **Members Area** of our website.

This year, we have also published the **European Printed Packaging Market Report**, following our organisation of the Packaging Conference in February 2019. This report joins similar publications prepared in previous years about other sub-sectors of print: magazines, direct mail and book printing. Next year we look forward to preparing a market report on commercial printing.

If you ever wish to know more about something published in any of our communications or reports you can contact me or another member of the team. We're always happy to hear from you!

Key communications achievements in 2018-19:

- New logo and corporate image
- New website
- Redesigned Newsflash
- Published Annual Economic Report
- Published European Printed Packaging Market Report
- Expanded social media presence (LinkedIn)
- New and improved event marketing materials

The logo graphic consists of a white square frame with a smaller white square frame inside it, positioned to the right of the word 'INTERGRAF'.

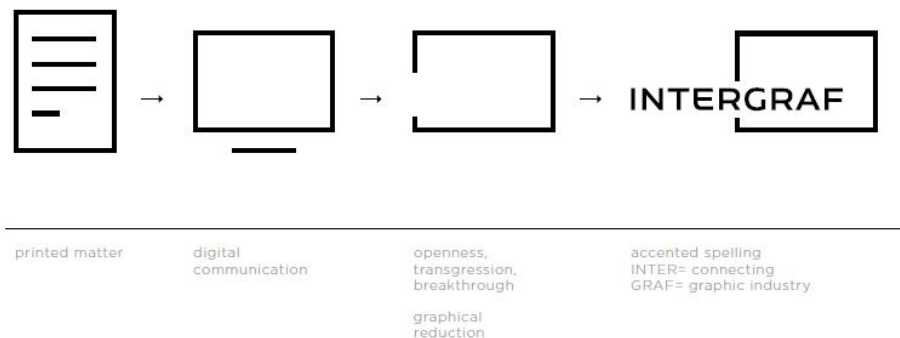
INTERGRAF

The logo graphic consists of a red square frame with a smaller red square frame inside it, positioned to the right of the word 'INTERGRAF'.

INTERGRAF

Communications Rebrand

Intergraf began 2019 with a BRAND NEW logo, corporate image and website. Our former logo had been through some minor redesigns in the past, but was largely the same since the 1980s. The team felt that it was time for a change, so we decided to re-vamp Intergraf's look to better reflect our values, mission, market and purpose, as well as to more clearly illustrate how we perceive the future of print. As you can see from the thought process below, the new logo embodies this interplay between past and present - traditional and digital.



The printing industry has a long and significant history in Europe, having influenced European development and culture in transformative ways. We proudly celebrate the important history from which our industry was born, but the face of the sector has changed. The graphic industry today embodies both the traditional and the modern. Even companies using traditional printing techniques are now highly digitised, using state-of-the-art technologies and highly efficient digital processes to manage their workflows. Intergraf's new logo better communicates our core message: that the printing industry in Europe is proudly a traditional sector, but it is also high-tech, modern, competitive and here to stay in a digital world.

The name "Intergraf" already embodies the dynamism and duality of the graphic industry. "GRAF" identifies the industry and "INTER" highlights both the international nature of our activities and the interplay between traditional and modern, as well as the unstoppable force that is the internet and digitisation. In our new logo, we

celebrate this duality visually through the use of a square, representing both a piece of paper and a screen.

After deciding on a new logo, the team began to work on a complementary corporate image - inclusive of new colours, fonts and publication/document designs. The aim of this exercise was to create a uniform Corporate Design Manual, which would form the basis of all future communications. Since finalising this manual, the team has redesigned multiple documents, including the Newsflash, News in Brief, Activity Report, Economic Report, Economic News, Market Reports, Policy Factsheets, event materials and much more!



Importantly, we have also presented our new brand in a new Intergraf website. Using the new logo and corporate image, our external communications are also now more sleek and modern, to better communicate our core messages.

Communications

Economic Publications

Intergraf's flagship publication is the Annual Economic Report, published once a year in May/June. The report provides statistical information for the EU28, as well as Norway and Switzerland. It provides a comprehensive overview of data about the European graphic industry. The report is freely available to Intergraf members and is for sale for non-members. We also send members a supplementary quarterly Economic Newsletter to ensure our members have all of the most up-to-date figures throughout the year.

Economic Report

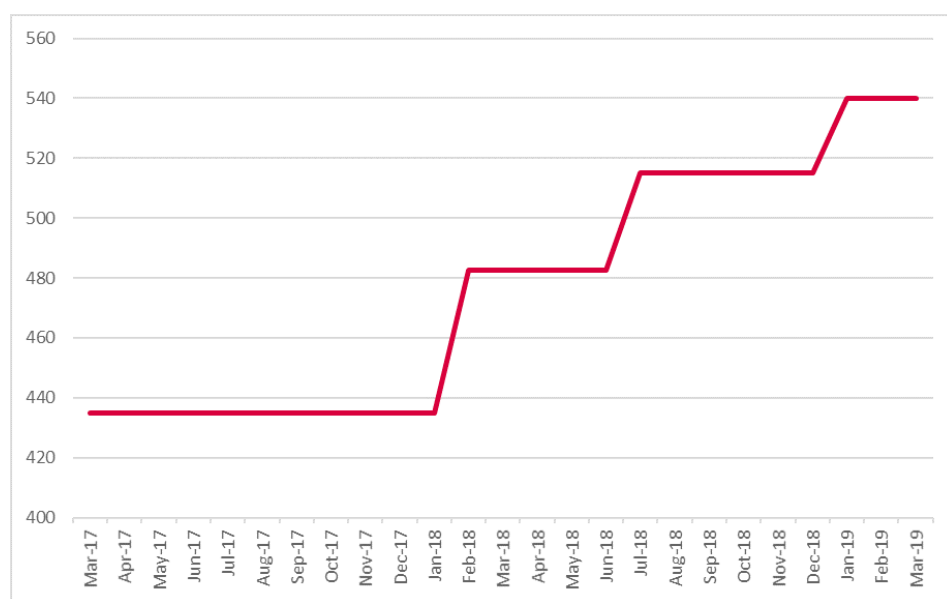
Intergraf's Annual Economic Report provides a historic perspective to the evolution of the graphic industry over the last 20 years. It presents comparable data for Europe and also economic information on sectors which are relevant to the graphic industry (i.e. inks, paper, publishing, books, press, energy, post, VAT). The 2019 edition features the number of companies and employees, as well as the turnover of the industry. It also includes data on labour costs, production values and trade. Smithers Pira provides forecasts for our report until 2023, including turnover by products and printing processes. Information about specific national printing markets, as given by Intergraf's members, are also included.

Our Economic Report report is free for Intergraf member associations and companies.

Economic Newsletter

ECONOMIC NEWS

Shorter-term data is provided to members in the Intergraf economic newsletters issued three times per year. A special edition about graphic paper is also published every summer. This newsletter includes information about paper consumption and paper prices. Considering the significant increases of the latter over the last year, we have also been issuing a monthly 1-page newsletter to provide information about the development of the situation, including the evolution of pulp prices.



Newsprint prices, Germany, in €/tonne

Communications

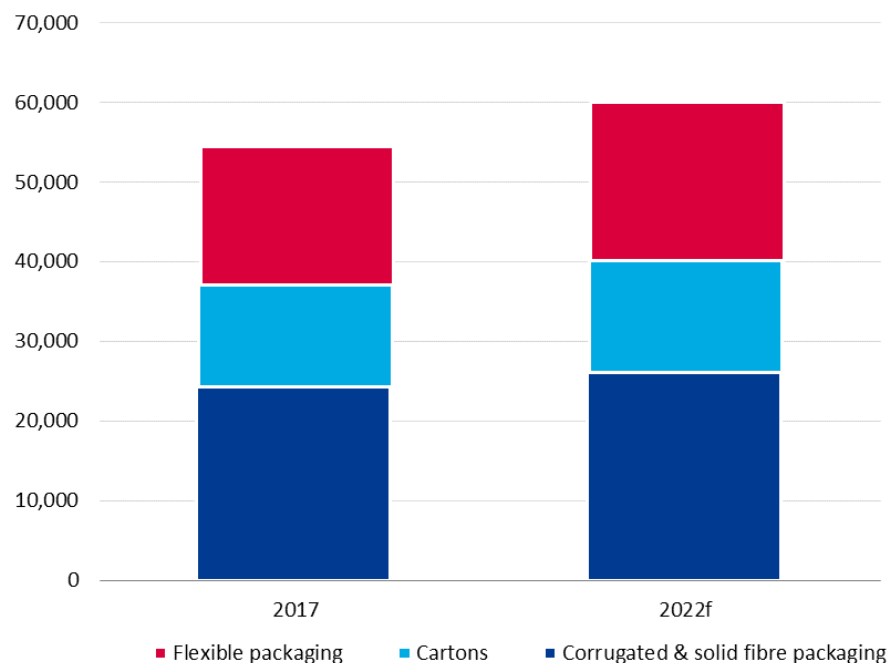
European Printed Packaging Market Report



Following our 'Shaping the Future of Print: Packaging Conference' in February 2019, Intergraf produced a market report about the packaging sector, with the support of our event partner Smithers Pira. This report was prepared exclusively for Intergraf and participants of the Packaging Conference.

The report contains two chapters: the first was authored by Intergraf and is a strategic review of the event and the growing packaging sector in Europe; the second was authored by Smithers Pira and presents key economic data and market trends. The Packaging Report is freely available for Intergraf members - please contact a member of the team to request your copy.

European printed packaging end-use markets by value 2017, 2022f (€ million, constant at 2017 prices & exchange rates)



Notes: Countries included are EU28, Norway and Switzerland. Data does not include other packaging (rigid plastic packaging and metal packaging) or labels

Source: Smithers Pira for Intergraf, 2019

EVENTS



Events

Print Matters for the Future: Print 4.0.



Theresa Muecke and Cees Verweij, Intergraf Student Award ceremony, Milan, June 2018

Conference

Print Matters for the Future is Intergraf's flagship annual event, taking place every year alongside our General Assembly. In 2018, the event was hosted by Assografici, Intergraf's Italian member association, at the occasion of the Print4All Fair in Milan. Our event focused on "Print 4.0." and was attended by over 50 Intergraf members and printing industry specialists from 19 European countries.

The prevailing conclusion of 2018's Print Matters for the Future conference was that "*if the industry does not change and move, it won't be there in the future*" (Cees Verweij, President of Intergraf). With all of our expert speakers focusing on different aspects of industry 4.0. and the digital transformation in printing companies, it is no surprise that changing business models and approaches to work were advocated.

The annual Print4All Fair provided the ideal backdrop for our conference's forward-looking conclusions, since participants were invited to explore the many new products and technologies being displayed by the hundreds of exhibitors at the fair.

Intergraf Student Award

The 2018 edition of Print Matters for the Future was an extra special event because it was also the occasion of the inaugural Intergraf Student Award ceremony. Theresa Muecke, Master Student in Print & Media Technologies at the University of Applied Sciences in Munich, won this edition of the award with her Master Thesis: "Digital transformation of industrial digital printing: Software concept for an optimised workflow management in industrial, decorative digital printing".

Intergraf supports print media academia by offering students working on a relevant topic for our industry the opportunity to win a prize of €5,000. The Intergraf Student Award is presented to a student who is judged by a panel of experts to have made the most outstanding contribution to print media research. Creativity and innovation in the graphic sector is supported by research and we wish to support students producing excellent work in this field by encouraging and awarding such research. We also aim to foster stronger links between the printing industry and its future workforce.



Events

Shaping the Future of Print: Packaging Conference 2019



Shaping the Future of Print is an event series organised by Intergraf in cooperation with market research firm Smithers Pira. This year, we focused on the European packaging market, with support from the flexo printing association FTA Europe. Packaging Conference 2019 welcomed 100+ leading packaging industry professionals from 22 countries to Brussels to discuss this growing sector of print in an event spanning three days. The event was sponsored by GAMA International, TRESU Group and Kodak.

Expert speakers joined Packaging Conference 2019 from Smithers Pira, the European Commission, The Retail Institute at Leeds Beckett University, Parker Williams Ltd. / Sun Branding Solutions, Parkide Flexibles Ltd., Cartotecnica Postumia, Pack4Food at Ghent University, PHD Packaging, EFIA UK and denkstatt GmbH.

The tone of the Packaging Conference was set by the first speaker Ania Krolak, Managing Consultant at

Smithers Pira, who pronounced packaging the “*most dynamic sector of print*”. Speakers throughout the day reinforced this view, elaborating on current and future packaging trends by focusing in varying levels of detail on issues relating to EU policy, consumers, technology, economics, sustainability, packaging design and the importance of new business models, for example. Given that this event was held in Brussels, the heart of the European Union, participants also had the opportunity to join a visit to the European Parliament.

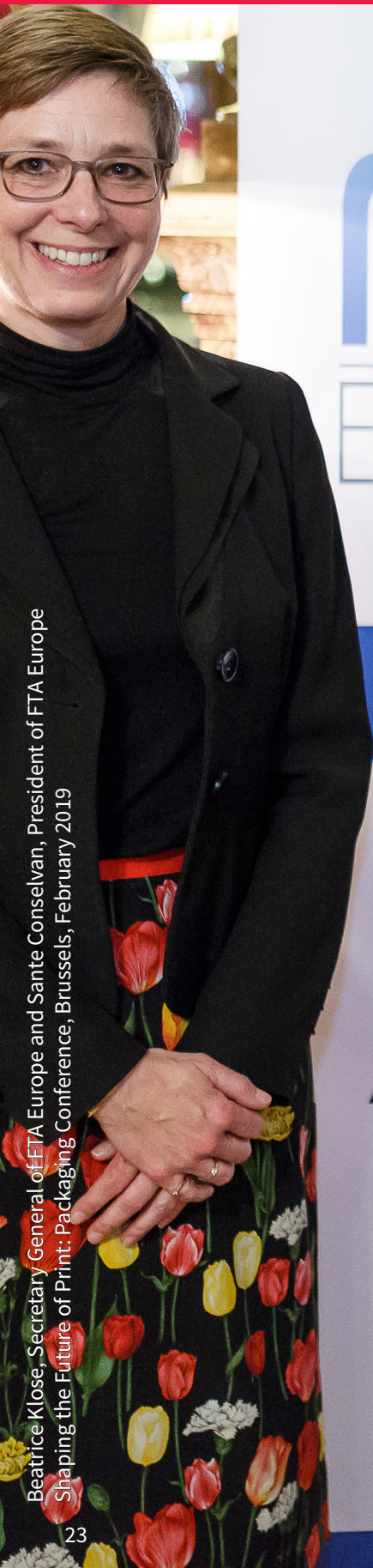
The feedback we received following this event was very positive, with many participants expressing a wish for the conference to be repeated in the future. The speakers were all highly praised and participants appreciated the neutrality of the event, which Intergraf worked hard to preserve.

The next edition of our Shaping the Future of Print conference series will focus on Commercial Printing in 2020.

Events coordinated by Intergraf in 2018-19:

- General Assembly, 31 May 2018, Milan (IT)
- Print Matters for the Future: Print 4.0., 1 June 2018, Milan (IT)
- Directors' Conference 2018, 3-4 September 2018, Vilnius (LT)
- Shaping the Future of Print: Packaging Conference, 22 February 2019, Brussels (BE)
- Social Dialogue Plenary, 1 April 2019, Brussels (BE)

SPECIAL INTEREST GROUPS



Beatrice Klose, Secretary General of FTA Europe and Sante Conselvan, President of FTA Europe
Shaping the Future of Print: Packaging Conference, Brussels, February 2019



MEMBERS



Sweflex.

FTA EUROPE

Special Interest Groups

FTA Europe



Intergraf has a close relationship with FTA Europe, the umbrella association representing the European flexographic printing industry. As the Secretariat of FTA Europe is administered by Intergraf, such cooperation is natural. For example, the FTA Europe Diamond Awards 2018 were held alongside Intergraf's General Assembly in Milan. This year was particularly noteworthy because of the Packaging Conference, which was organised jointly by the two associations. The Flexo Best Practice Toolbox was also launched in parallel to this event.

Diamond Awards

Around 240 professionals from the European flexo community attended the 2018 edition of the FTA Europe Diamond Awards in Milan. This bi-annual awards ceremony recognises excellence in 14 different categories to celebrate the best in flexo printing in Europe. 44 companies were awarded in Milan for their high-quality work.

Entries for the FTA Europe Diamond Awards are decided at national award ceremonies, with national winners joining their European counterparts at the international event. The next Diamond Awards will take place in Düsseldorf on 18 June 2020.

Flexo Best Practice Toolbox

Since 2016, the Flexo Best Practice Toolbox project has been collecting information from a variety of cross-industry experts to create a reference document for flexo printers and suppliers.

The first version of the Flexo Best Practice Toolbox was launched in 2019 as an e-book, which gives practical details about the flexo process and how to fix problems the press operator may encounter. The Toolbox is now available to be purchased from the Apple Store. It is currently only available in English, but will be translated into more languages in the future.



“The cooperation between FTA Europe and Intergraf has been particularly notable this year because of our joint organisation of the Packaging Conference. The packaging market is crucial to both the flexo and wider printing industry, since it is a fast-growing sector, so events like these are much needed. Working together with Intergraf on such events adds a lot of value to our partnership.”

Sante Conselvan, President of FTA Europe



Intergraf SecurityPrinters, Banknotes & Identity conference and exhibition, Dublin, March 2018

Special Interest Groups

Security Printing

Conference & Exhibition

SecurityPrinters Banknotes+Identity

Intergraf's most recently organised 'SecurityPrinters Banknotes+Identity' conference and exhibition took place in Dublin, Ireland, in March 2018. Following this event, the security printing team have been working hard to prepare for the next conference and exhibition in Copenhagen, Denmark, in October 2019.

This event is one of the world's largest for the banknote and ID document sectors. The three-day event takes place every 18 months in different cities in Europe. It unites over 900 participants, 110 exhibitors, 70 speakers and 360 companies from close to 60 countries.

Intergraf's SecurityPrinters event provides participants with many opportunities to network with leading executives of security printing companies, central banks and law enforcement from all over the world. Intergraf members can enjoy attending the conference and exhibition for a reduced fee - giving an opportunity to save more than €60.000 per event.

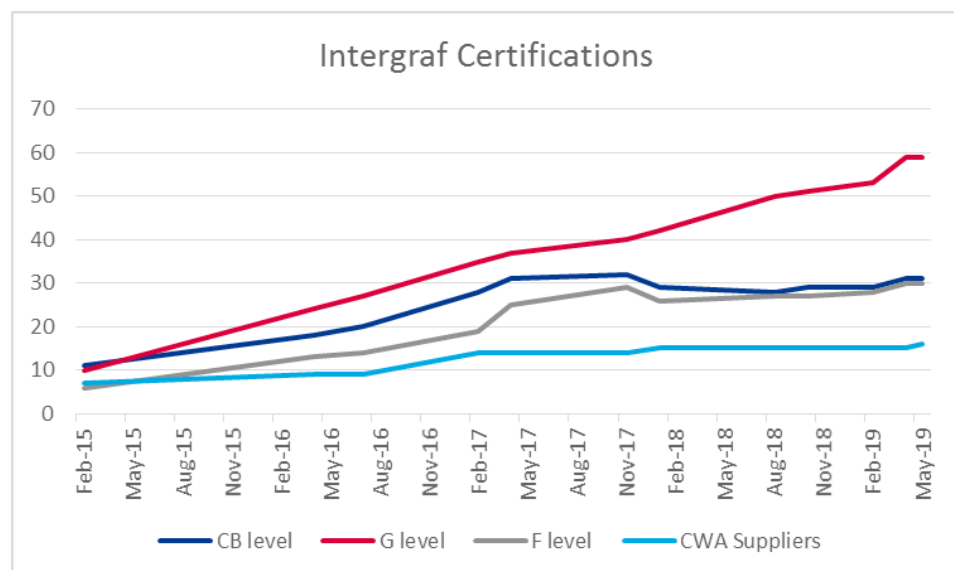
Certification



Suppliers and printers of security printing products are eligible to apply for Intergraf's two certifications: ISO 14298 for printers and CWA 15374 for suppliers. These certifications ensure state-of-the-art security measures and processes within security printing companies.

Our internationally-recognised standards help to protect this highly secure industry by means of certification, thereby contributing to the fight against fraud. Certified companies benefit from a higher level of trust; alignment with the industry standard for quality and information security; and clarity about how their systems are safeguarded. Our certifications also help companies to prepare for the unexpected.

As you can see from the graph below, the number of companies certified by Intergraf is steadily growing.



GOVERNANCE



Governance Working Structure



Intergraf General Assembly, Copenhagen, May 2017

General Assembly

Intergraf's General Assembly is the association's main decision-making body, where members approve the work, governance and finances of the previous and upcoming years. The General Assembly is made up of Intergraf staff and members who meet once per year.

Management Board

The Intergraf Board directs the overall strategy of the association. It is made up of nine company representatives who meet four times per year. Countries represented on the Board are currently: Denmark, Germany, Italy, Latvia, the Netherlands, Portugal, Sweden and the United Kingdom. A representative from FTA Europe is also on the Board.

Steering Committee

Intergraf's Steering Committee carries out the strategic plan of the Board. It is made up of eight association Directors who meet four times per year. Countries currently represented in the Steering Committee are Belgium, Denmark, Germany, Hungary, Italy, the Netherlands, Portugal and the United Kingdom.

Working Groups

Intergraf has two active Working Groups: the Economics & Statistics Working Group and the Environment Working Group. These groups meet regularly to share information and to review the policy work of Intergraf. Our policy work at European level is informed by the experts in these Working Groups. Both groups are managed by Laetitia Reynaud, Policy Adviser.

Secretariat

The Intergraf Secretariat is made up of three teams: core business, security printing and accounting/administration. All three teams are managed by Beatrice Klose, Secretary General. The Secretariat carries out the day-to-day work of the association.

Governance Secretariat

Alison
Communications
& Policy Officer

Laetitia
Policy Adviser

Beatrice
Secretary General

Annie
Membership &
Information Officer



Intergraf's day-to-day core business activities are carried out by four people based in Brussels. **Secretary General Beatrice Klose** oversees the overall management of the Secretariat's work. **Policy Adviser Laetitia Reynaud** is responsible for all economic and environmental issues. She also produces Intergraf's flagship publication, the Annual Economic Report. **Communications & Policy Officer Alison Grace** is responsible for Intergraf's communications, social affairs activities (including Social Dialogue) and work relating to the image of print (e.g. the Keep Me Posted EU campaign). **Membership & Information Officer Annie Scanlan** manages the work of the flexographic printing association FTA Europe, as well as being responsible for event organisation and the monitoring of packaging-related topics for Intergraf.

Together, the Intergraf team acts as the

graphic industry's voice in Brussels, attending meetings and events on behalf of the European printing industry. More legislation than ever before is decided on at European level - much of which affects the day-to-day running of a printing company. We are our members' eyes and ears in Brussels, monitoring new policy developments and meeting with the European Commission and other EU officials when potential legislation is being considered. We ensure that the concerns of the graphic industry are heard.

Intergraf also provides a European platform through which our members' national expertise can be shared. The Secretariat's work ultimately relies on the knowledge of national member associations and companies. We are the European graphic industry's dedicated platform for advocacy and communication.

Governance Members

21 members
from 20 countries



PRINTING INDUSTRY UNION
OF BULGARIA





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