

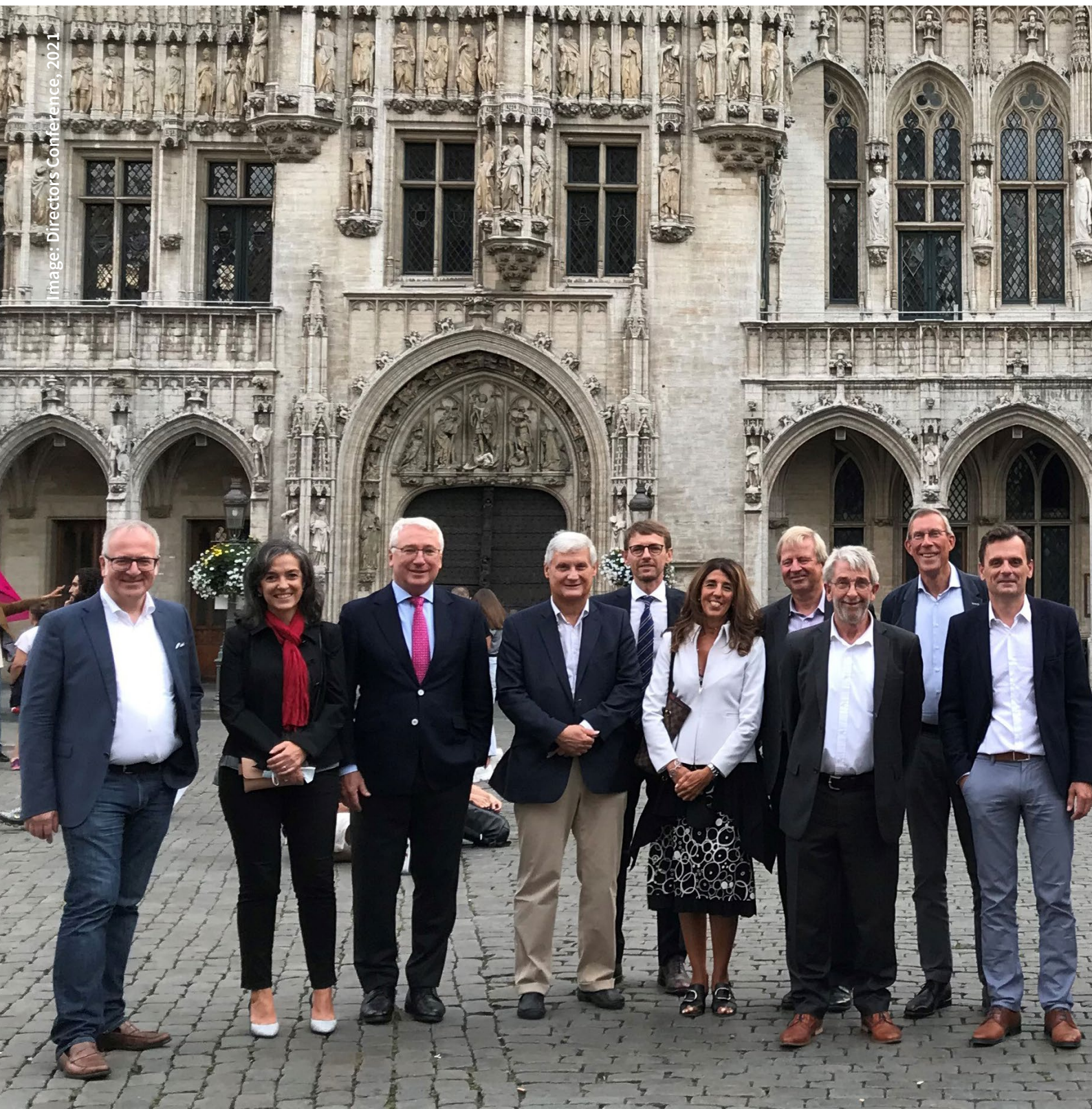


INTERGRAF ACTIVITY REPORT

June 2021 - May 2022

EUROPEAN AFFAIRS TEAM

INTERGRAF





THE EUROPEAN PRINTING INDUSTRY



112.000
PRINTING COMPANIES



95%
FEWER THAN 20 EMPLOYEES



630.000
EMPLOYEES



€82 BILLION
TURNOVER (EU27+UK; CH; NO)



€3 BILLION
POSITIVE TRADE BALANCE

FOREWORD

After a challenging pandemic year in 2020, we were all hoping for a “**time after corona**” and “**back to normal**” in 2021. This, unfortunately, did not happen and normality is still far away. The pandemic, is after more than two years, still part of our lives!

2021 was still a very difficult year. In the first half of 2021, the level of orders was still low. In the second half, business came back, yet facing a massive increase in paper prices and significant problems with the supply chain.

Our sector, unfortunately, did not have the chance to fully recover. However, businesses have been growing, mainly in the second half of 2021. Some product groups have been very stable, **books experienced a resurgence**, and the share of eBooks is decreasing. Overall, our sector has shown flexibility, finding the possibilities to react and offer the services to our customers in the best way.

Environment continues to be an important issue on our agenda. Print is using renewable and recyclable materials. Printed communication is very effective and with the new Intergraf recommendations to reduce **carbon footprint** printers have an excellent tool. Customers need to understand that digital communication also has a carbon footprint and that high data volumes are not “CO2 free”. Print is an essential contributor to **Europe’s economy**, both now and in the future. We have been cooperating for many years with our members, focusing

on **environmental** protection, **digital transformation** and availability of **raw materials**. These issues have been at the core of Intergraf’s work this year. We have shared views with our members, providing a **Roadmap** to CO2 calculation, CO2 reduction, and CO2 compensation in the printing industry. Moreover, we have been extremely active with the **trade** and the general **press** on the issue of **paper prices** and **availability**, working closely with the European Commission to ensure the supply of raw materials for the future. The paper crisis has switched our priorities from the **Print your Future project** in 2021, and the aim to secure skilled workers for the future to raising awareness on the increase of paper prices and the shortage of our most important raw material in 2022. Nevertheless, attracting new workers to our sector remains crucial. In January 2022 our Print Your Future project closed. We are very grateful for the outcomes of this project, and we are sure it will be helpful to take steps to attract and recruit the next generation of print professionals. We also managed to organise **in person events** such as our Directors Conference in Brussels, Shaping the Future of Print (Chapter 2) in Frankfurt, Intergraf Currency+Identity in Lyon, and Print Matters for the Future in Stockholm.

This past year has proven to be a challenging year for our industry and we thank all our members for their support and collaboration!



Ulrich Stetter
President



Beatrice Klose
Secretary General

2021-22

IN NUMBERS



20
FULL
MEMBERS
19 COUNTRIES



10
ASSOCIATE
MEMBERS
6 COUNTRIES



5
WORKING GROUP
MEETINGS

1 ECONOMICS & STATISTICS
4 ENVIRONMENT AND FOOD CONTACT
MATERIALS TASKFORCE



5
BOARD
MEETINGS



CURRENCY+IDENTITY
830 PARTICIPANTS
98 EXHIBITORS
55 COUNTRIES



277

EVENT PARTICIPANTS

48 SHAPING THE FUTURE WITH BOOKS (CHAPER 2)
25 DIRECTORS' CONFERENCE
70 WEBINAR ON APPLYING FOOD CONTACT
MATERIALS LEGISLATION
31 GENERAL ASSEMBLY
103 PYF FINAL CONFERENCE



4
STEERING
COMMITTEE
MEETINGS



320+
NEWSLETTER
SUBSCRIBERS



80+
MEDIA
MENTIONS



14
PRESS
RELEASES



63k
WEBSITE PAGE
VIEWS



4th
YEAR OF YOUNG
TALENT AWARDS



6
CONFERENCES
ORGANISED

- VIRTUAL GENERAL ASSEMBLY
- DIRECTORS' CONFERENCE
- BOOK CONFERENCE
- PYF FINAL CONFERENCE
- WEBINAR ON FOOD CONTACT
- MATERIALS LEGISLATION
- CURRENCY+IDENTITY CONFERENCE



2.116
SOCIAL
MEDIA
FOLLOWERS

1,854 LINKEDIN
262 TWITTER

Image: Intergraf Print Your Future Final Conference, 2021



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PART 1: KEY TOPICS

“Challenges and opportunities are very similar, and I have got many good ideas on how to develop Grafiska Företagen by discussing with my European colleagues. Through the years I have become more and more impressed with Beatrice and the Intergraf team. You cover a wide range of issues and produce very good reports that we as national associations can use to increase value to our members.

Ravindra Parasnis, Former Director of Grafiska Företagen, Intergraf Member

PART 1.1

DISRUPTION IN PAPER SUPPLY

1.1 DISRUPTION IN PAPER SUPPLY

WORKING TOGETHER TO ENSURE THE RAW MATERIAL SUPPLY FOR THE FUTURE

Over the last year, the printing industry has been experiencing an **unprecedented crisis**. The capacity of paper production in Europe has reduced with implications for printers, their customers, and of course vital print products like news media, food, medicines packaging or schoolbooks. The situation highlighted the important role that print products play for European citizens and contributed to even closer cooperation among European associations.

The sector has been challenged by **several factors**, firstly the **digital transition** for our economy, secondly, the European market has faced a growing **shortage of paper**, prices increases and supply disruptions. Moreover, we have seen the trend of using paper and board for **packaging** in replacement of plastics, as well as increased use of packaging for e-commerce. Paper prices started to increase in mid-2021. These **soaring paper prices** are attributed to increasing raw materials, logistics, and energy costs. In October 2021, the situation reached its climax when paper suppliers imposed sudden energy surcharges. Since January 2022, printing companies have not been able to find enough paper on the European market. The **strike** in Nordic paper mills has greatly aggravated the situation. With demand recovering well after the dramatic decline in 2020, the challenging situation has led to delivery failure. Companies in both the publication and packaging fields work very closely with customers to find solutions to avoid the shortage of many printed consumers goods.

These difficult circumstances created an opportunity to discuss with **European colleagues** how to ensure a sufficient paper supply, shape the future of our sector and communicate the important role of print products in today's society. **Intergraf** worked together with publishing and marketing associations in order to urge the **European Commission** to ensure a continuous supply of paper for our industries.



Image: Intergraf Board Meeting, 2022

We published several press releases, position papers, statements. Moreover, we sent a letter to the **Commissioner** for Internal Market, Thierry Breton, to which we received a constructive reply and we had a meeting with the **European Commission** in April 2022 to discuss the print supply chain situation. The paper shortage attracted a lot of attention in several international media. Jesper Jungersen, Intergraf Vice President and managing Director of Aller Tryk, was interviewed by the **Financial Times**. Beatrice Klose, Intergraf Secretary General, had a live TV interview with **BBC News** broadcasted on BBC World TV in the programme “World Business Report”.

What's next?

Unfortunately the outlook is not very positive: the war in **Ukraine** will have impacts not only on the energy prices, but also on the **supply of wood and pulp** for European paper makers. This will further tighten supplies in the middle to long term, which are a major concern for the **future** of our industry.

“ Since 2021, the European Commission has maintained the same position on national legislation implementing opt-in scheme for unaddressed printed advertising: it should be notified to the EU and should respect the requirements of the European Treaty, implying that it should be non-discriminatory, justified by an overriding reason of public interest and proportionate.

Laetitia Reynaud, Policy Advisor at Intergraf

PART 1.2 CONTINUOUS PRESSURE ON DOORDROPS IN EUROPE

1.2 CONTINUOUS PRESSURE ON DOORDROPS IN EUROPE

Restrictions on unaddressed printed advertising continued to be discussed in a number of European countries in 2021 and 2022.

In the **Netherlands**, 18 cities now have implemented or are about to implement an opt-in scheme for doordrops. This represents only 5% of Dutch cities but they include several of the largest cities of the country. After having used all national legal remedies and lost in the supreme court in 2021, Intergraf's member, KVGO, and their industry coalition have lodged a complaint to the European Commission in early 2022. The European Commission has up to 12 months to reply.

In **Germany**, the pressure from pro-opt-in campaigners continues and our German member bvdm successfully manages for now to preserve the opt-out scheme in the country.

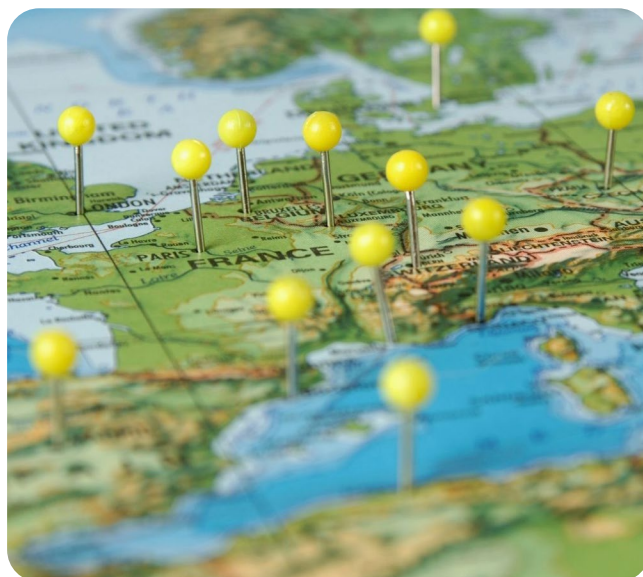
France has adopted a 3-year experiment of the opt-in system in 15 cities and rural areas. The experiment runs from mid-2022 to mid-2025.

In **Luxembourg**, a far-reaching legislation on waste is about to be adopted. The text includes an article implementing a nation-wide opt-in scheme.

The pressure in **Denmark** for the introduction of a national opt-in scheme is growing and the government is increasing its communications with the European Commission.


To provide the Commission with arguments in favour of maintaining national opt-out schemes, the **European coalition**, formed in 2020 enlarged to additional European and national associations. 28 associations of the print value chain as well as associations representing publishers, advertisers, direct mailers, unions, charities and fundraising associations, have co-signed a letter to the Commission's services for internal market and industry. The Commission has invited coalition's representatives to discuss the matter.

We expect challenging months and years ahead of us with continuous pressure on unaddressed printed advertising in Europe.



“Paper communications and mail grab attention. They are trusted and reliable, making recipients feel valued. When it comes to receiving bills, statements, and relevant information, service providers should be aware that most consumers want the right to choose how they receive them, either on paper or online.”

Keep Me Posted EU Campaign

A man and a woman are sitting on a light-colored sofa. The woman, on the left, has blonde hair tied back and is wearing a grey cardigan over a light green shirt. The man, on the right, has dark curly hair and a beard, wearing a white polo shirt. They are both looking down at a white piece of paper that the man is holding. The background is a bright, out-of-focus interior space.

PART 1.3

THE ROLE OF PRINT TOWARDS THE DIGITAL TRANSITION

1.3 THE ROLE OF PRINT TOWARDS THE DIGITAL TRANSITION

OUR APPROACH TOWARDS DIGITISATION

Intergraf aims to highlight the **vital role of print communications** through several initiatives. With digitisation accelerating, we have stressed the importance of print products in Europe's digital transition.

We have published **position papers** and **statements** in response to the European Commission's 'digital by default' and 'digital-only' approaches in the European economy.

The printing industry is concerned about the ongoing developments that promote digitalisation of documents by default and lead to a digital only economy. While we acknowledge that digital technology allows efficient access to documents and information, users should continue to have the right to access information in paper format. The digital version should rather be considered as a complementary tool.

In the field of books, Intergraf has published a joint statement in December 2021. Together with the European and International Booksellers Federation and the Federation of European Publishers, Intergraf outlined the essential nature of books for Europe's culture, education and economy "No Christmas without books".

→ www.intergraf.eu/policy/policy-positions

→ www.intergraf.eu/communications/press-releases

CAMPAIGNS

- Keep Me Posted EU (on Steering Committee and Co-Coordinator) → www.keeptepostedeu.org
- Two Sides (on Steering Committee)
→ www.twosides.info
- The Future of Reading (unofficial campaign)
→ www.intergraf.eu/image/the-future-of-reading



KEEP ME POSTED EU CAMPAIGN

Intergraf coordinates the Keep Me Posted EU Campaign alongside PostEurop, the trade association representing European public postal operators and FEPE, the federation representing European organisations in the paper-based envelopes and packaging sector. Together we lobby for the citizens' right to choose how they are contacted - on paper or digitally. Our role as coordinators mostly includes advising on policy issues and running the campaign communications.

→ www.keeptepostedeu.org



“Books are a very important cultural and educational product. Reading long informational text in print has proven to be better for understanding and retention.”

Intergraf President,
Ulrich Stetter

“The carbon footprint of products is among the requirements of the draft European Regulation on ecodesign for sustainable products presented on 30 March. Regulatory as well as customers’ demands for the reduction of the carbon footprint of printed products will increase. In addition to a fit-for-purpose approach to assess its carbon emissions, the printing industry now provides the market with a procedure to prioritise the reduction over the compensation of carbon emissions of its products.”

Laetitia Reynaud, Policy Advisor at Intergraf

PART 1.4

PRINT’S CARBON FOOTPRINT

1.4 PRINT'S CARBON FOOTPRINT

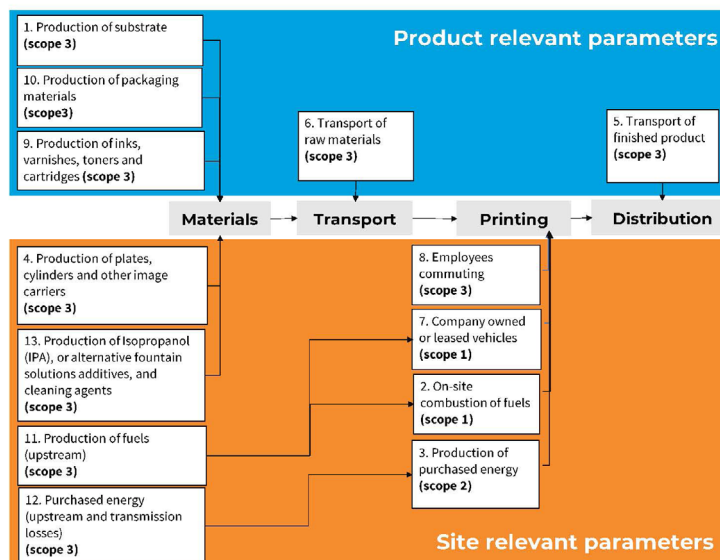
To prove its environmental credentials and assess the **carbon footprint** of its products, the European printing industry is equipped with a solid and harmonised tool: since 2013 the **Intergraf Recommendations on CO2 emissions calculation in the printing industry**. There are numerous tools available on the market to calculate the carbon footprint of a product or a company. However, the approach adopted by Intergraf is the only one which has been developed by **printing industry experts** for the printing industry and their products. The Intergraf Recommendations identify 13 parameters covering 95% of all carbon emissions of a print process or product. They are based on the 3 scopes of the International Greenhouse Gas Protocol.

Intergraf has taken a step further in 2021 and developed a **Roadmap to CO2 calculation, CO2 reduction and CO2 compensation in the printing industry**. It supports companies aiming at placing

on the market printed products that are **energy and CO2 optimised**. While the market increasingly asks for carbon compensation rather than looking at the potential of reducing CO2 emissions and energy consumption, the **Intergraf Roadmap** provides printers as well as print buyers with a concrete procedure to categorise parameters that influence carbon emissions and prioritise reduction measures of CO2 emissions in the industry.

The categorisation into parameters related to the printing company and the design of the printed product is essential for the prioritisation of the activities for the reduction and compensation in the life cycle of the printed product.

In this way, reduction measures can be identified, prioritised, implemented and subsequently evaluated step by step. The Roadmap is available on **Intergraf newly launched print's carbon footprint webpage**.



→ www.intergraf.eu/about-print/print-carbon-footprint

“Amidst a non-harmonised legal scenery concerning Food Contact Materials, it was crucial to provide printers a clear presentation of all applicable legal requirements and practical advice on compliance. Download our guide or watch our webinar to understand the full picture.

Despoina Melissinou, Membership & Events Officer at Intergraf

PART 1.5 DEVELOPMENTS ON APPLYING FOOD CONTACT MATERIALS LEGISLATION

1.5 DEVELOPMENTS ON APPLYING FOOD CONTACT MATERIALS LEGISLATION

Printed Food Contact Materials (FCMs) are a growing and promising market for printers. The complex and non-harmonised legal framework surrounding it, naturally, presents challenges. A non-harmonised legal framework means more burden for companies, especially when it refers to printers, who are usually **SMEs**, and have limited resources to demonstrate their compliance with the applicable legislation. The **European Commission** is currently reviewing the regulatory framework and announced it will conclude the process in mid-2023 and propose new legislation. Additionally, two member states, **Germany** and **France**, proposed their own national legislations, the German Printing Ink Ordinance and the French decree on Mineral Oil respectively. For the latter, Intergraf has submitted comments on the TRIS notification, as such national measures create further technical and economic burden for the entire value chain and disrupt the European Single Market principle.

Intergraf not only wants to ensure that the printing sector is taking advantage of the printed food contact materials market and is committed to complying with the food contacts legislation, but further aims to support printers and provide them with the tools necessary to make their compliance a seamless experience.



GUIDE AND WEBINAR ON APPLYING FOOD CONTACT MATERIALS LEGISLATION

Stemming from this objective, Intergraf and FTA Europe published their joint **Guide on Applying Food Contact Materials Legislation** in 2021, with the aim to provide printers with a clear presentation of all applicable legal requirements and practical advice on compliance. The guide, based on the CAST Project Guidelines, highlights the significance of efficient communication along the entire value chain and provides printers with valuable practical support with the “Check list of responsibilities and actions” and the template of the “Declaration of Compliance” (DoC). The guide is publicly available on the **Intergraf website**.

In order to highlight the importance of the Guide on Applying Food Contact Materials Legislation, Intergraf in partnership with FTA Europe organised a successful **Webinar on Applying Food Contact Materials Legislation** on 3 December 2021. The online event welcomed 70 people from all over Europe (and beyond), that tuned in to discover the scenery in EU legislation and learn more about the content of the Guide on Applying Food Contact Materials Legislation.

“

The printing industry should take into consideration the opinions of the young generations. It is crucial to listen to young people, driven by the desire to make a change.

Tom Maskill, Intergraf Young Talent Award First-Place Winner 2022



1.6 THE NEXT GENERATION OF PRINT PROFESSIONALS

PRINT YOUR FUTURE PROJECT

How do you find, attract, and keep the next generation of professionals in the printing industry? The **Print Your Future Project**, supported by the European Commission and co-coordinated by Intergraf alongside UNI Europa, aims to support recruitment and employment in the European graphical sector, helping companies to hire the best talent and secure a bright future for the printing industry. The project closed after two years of work and a **final report** was published on the website. One of the primary deliverables on the project was a **Best Practice Toolkit** on recruitment and employment. You can find the toolkits in several languages and the final report on the project's website. Intergraf thanks all those involved in the project. The time to act is now. Let's inspire **future generations!**

→ www.printyourfuture.eu



HOW TO FIND
ATTRACT AND KEEP
THE NEXT
GENERATION

BEST PRACTICE TOOLKIT
FOR THE EUROPEAN GRAPHICAL SECTOR



INTERGRAF YOUNG TALENT AWARD

In order to recruit and retain the best talent for the future of the European printing industry, it is important to listen to the views of young people and their opinions on the future of the industry. Our **Intergraf Young Talent Award** provides a platform for this. This year the focus was on **sustainability**, a topic included among the top priorities on the EU agenda. Candidates were requested to respond to the following questions:

- 1 *How do you see print products (graphics and packaging) in the circular economy?*
- 2 *What is your vision for print for a sustainable future?*

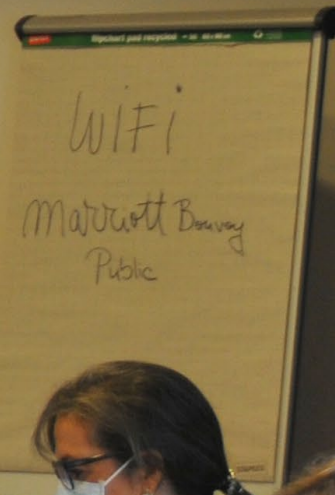


→ www.intergraf.eu/image/young-talent-award

Image: Directors' Conference, 2021



WELCOME DIRECTORS' CONFERENCE 2021



PART 2: OUR WORK

2.1 NOTE FROM THE EU AFFAIRS TEAM



Image: the EU Affairs Team, 2022

“We are very grateful that our weekly meetings are back physically! We feel that it is important to discuss face to face the situation of our industry and how to better serve our members.”

The Intergraf EU Affairs Team

In June 2021 a new **Membership & Events Officer** joined the Intergraf EU Affairs Team, **Despoina Melissinou**. Despoina has a background in communications and events, starting her professional journey in the field after coming to Brussels for her Master’s studies, in late 2018. She is responsible for managing the FTA Europe Secretariat, as well as organising Intergraf’s events. Despoina’s native language is Greek and she speaks English and a little Dutch. With **Alison Grace** beginning maternity leave in mid-December 2021, we welcomed another new face at Intergraf, **Irene Paolinelli**. With a range of international experience in communications and European Affairs (including the European Parliament), Irene took over the role of **Communications & Policy Officer**. She is from Italy and speaks Italian, Portuguese, English, Spanish and French.

We wish all the best to Alison and her baby, Felix!

2.2 NOTE FROM BEATRICE AND LAETITIA

BEATRICE KLOSE, SECRETARY GENERAL



This was a challenging year for the printing industry. The **paper crisis** has been at the core of Intergraf's work. In the field of lobbying, we focused also on **environmental** issues and **digital** transformation. We have worked closely with our members to analyse and classify the policy priorities and I am grateful for their input. As regards the **future** of our

industry, I am pleased that the **Print Your Future project** closed after two years of work and I would like to thank all the project partners involved. Moreover, with the **Intergraf Young Talent Award**, we heard this year invaluable views from print professionals of tomorrow. The focus was on **sustainability**, a topic included among the top priorities on the EU agenda. Last but not least, Intergraf extended its network and gained five **associate members** in 2022. We are happy to cooperate more closely with some of the major suppliers in our industry.

“2021 has undoubtedly been another testing time for all of us. We went through additional waves of the pandemic and we were given unprecedented challenges in the paper supply to master. I am grateful for the collaboration with my team and the European colleagues.”

Beatrice Klose, Secretary General of Intergraf

LAETITIA REYNAUD, POLICY ADVISOR



Our priority in the last 12 months was to support the sector in providing our members with relevant **economic information** and convey the challenges faced by the industry to European authorities. At the same time, the work on **policy issues** did not slow down. On the contrary, the European Commission and European Parliament accelerated their work on numerous files, which had been delayed with the pandemic. These include in particular topics related to **environment** but not only:

the proposed Regulation on deforestation, the review of the Machinery Directive, the new product safety Regulation, national development on mineral oil in printing inks, the review of the packaging waste Directive, the future legislation on food contact materials and the review of the European chemical legislation REACH. We have also been monitoring a number of **economic dossiers**, like VAT rates, the EU-US trade dispute, the taxonomy Regulation, the new legislation on corporate sustainability due diligence and reporting and import duties on paper. Most of these files will continue to be on our agenda in 2022 and 2023. The Roadmap on **Carbon Footprint** is also a key milestone for Intergraf's work this year.

“In the last 12 months, Intergraf faced the economic crisis of the sector and the increasing policy initiatives delayed during the pandemic. Thanks to the support of our members, we were able in parallel to deliver a new tool on carbon footprint for the printing sector.”

Laetitia Reynaud, Policy Advisor at Intergraf

2.3 NOTE FROM DESPOINA AND IRENE

DESPOINA MELISSINO, MEMBERSHIP & EVENTS OFFICER



The year 2021 was truly a time for recovery, re-discovering and re-establishing the world, in order to adapt to a new “normal” after two years in a global health crisis. The pandemic, along with the current paper and energy crisis highlight the importance of national associations in supporting printers. During those years we moreover discovered that our need for connecting will

always be there – whether this means **connecting** via a conference call, or slowly, yet confidently, meeting again in-person. At Intergraf we are proud to have members who work relentlessly to support and ease the work of printing companies and we are equally proud we had fruitful **in-person meetings** with them. We are currently looking forward to the next time we will meet again, at the **Intergraf General Assembly** and Print Matters for the Future Conference, on 19 & 20 May, in Stockholm, Sweden.

“At Intergraf we are proud to have members who work relentlessly to support and ease the work of printing companies and we are equally proud we had a fruitful in-person meeting with them, at our Directors’ Conference. Shaping the Future with Books was another successful in-person event.

Despoina Melissinou,
Membership & Events Officer
at Intergraf

IRENE PAOLINELLI, COMMUNICATIONS & POLICY OFFICER



Intergraf’s **community** has been steadily growing this year. First, the number of followers on **social media** increased significantly. Solely through organic growth, we now reached about 2.000 followers. Our performance on LinkedIn achieved impressive **results**, with posts reaching an average of **20.000** monthly impressions. Furthermore, concerning the **press**, we are proud to have contributed to a record number

of articles and interviews, such as BBC News, L’Express, Reuters, the Financial Times, and many more. Overall, Intergraf gained +80 **media mentions**. I am sure that this year’s developments will **positively impact** the image of the printing industry in the future. Finally, concerning employment and **EU social affairs policy**, we are taking a step further by collaborating with several organisations to make the voice of the printing industry heard. The Keep Me Posted EU campaign and Intergraf’s work on the image of print stand as two clear examples of this progress.

“Social media are crucial to highlight Intergraf’s activities and the importance of the printing industry for our society. We are very satisfied with the impressive results we achieved. This year our community has been growing significantly and we look forward to growing more in the future.

Irene Paolinelli,
Communications & Policy
Officer at Intergraf

INFORMING



2.4 ECONOMIC INFORMATION

Intergraf's economic information flows through a comprehensive series of products. First of all, we publish our **Annual Economic Report** every year in May/June. This report, Intergraf's primary publication, is free of charge for **Intergraf members** while also being available to non-members to be purchased.

The Intergraf Annual Economic Report offers a comprehensive **statistical overview** of the European graphic industry (EU + UK, Norway, and Switzerland). This product includes an outline of all relevant data, mostly deriving from Eurostat and our members on the printing industry and other sectors of pertinence, such as ink, paper, publishing, books, press, energy, and postal. Our report also features a 4-year forecast, the **European Print Market Review**, published in collaboration with our market research partner, Smithers.

Finally, the monthly **Economic News newsletter** provides our members with timely updates. This shorter communication is supplemented three times per year by the **Economic Newsletter**, which gives more extensive information.

Order our 2022
Economic
Report here →

[www.intergraf.eu/
communications/annual-
economic-report](http://www.intergraf.eu/communications/annual-economic-report)

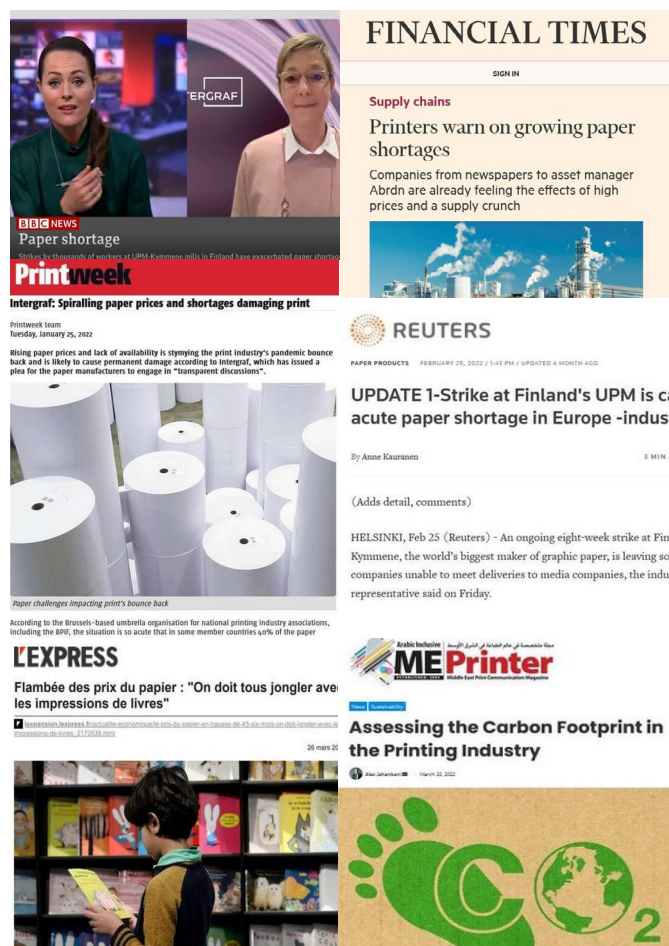


COMMUNICATIONS

2.5 COMMUNICATIONS AND PRESS

We aim to spread the word about Intergraf's activities, interesting developments at **European** and **national** level, and the importance of the printing industry that serves European citizens in their daily lives by producing essential goods that are key conveyors of information, education and culture in Europe. The printing industry has faced several challenges this year and the issue of paper shortage attracted the attention of many

international media. Intergraf has contributed to a record number of articles and interviews, such as in the **Financial Times**, **L'Express**, **Reuters**, **radio Bel-RTL**, and **BBC News**. In social media, Intergraf reached a wider audience than ever. Its performance achieved impressive results, on **LinkedIn** posts reached an average of **20.000 monthly impressions**. The number of followers has also increased significantly.



COMMUNICATIONS ACTIVITIES

PUBLIC: Annual Activity Report, Newsletter (Newsflash), Press Releases, Trade Press Articles, Position Papers, Multimedia (leaflets; videos, photos; infographics), Website, Social Media (LinkedIn and Twitter).

MEMBERS ONLY: Annual Economic Report, Market Reports, Newsletter (Economic News; News in Brief; Market News), Factsheets.



FOLLOW US!



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2.6 NETWORKING AND EVENTS



In 2021 we managed to effectively return to **in-person events**. Starting with the **Intergraf Directors' Conference** in September, in the surprisingly sunny Brussels, the Directors of our member associations were happy to return to physical meetings.

A month later, in October, **Shaping the Future with Books (Chapter 2)** took place as our second in-person event for this year. Following **Chapter 1**, which was a successful webinar in February, Chapter 2 took place at the Frankfurt Book Fair, while upholding all safety measures. Our 14 speakers were originating from the print, publishing, and research sectors of the book industry, showcasing a variety of views and topics, as diverse as the **European book market**, while our partner, Smithers presented their data on the book market. Among the variety of views presented, one thing appeared certain: the book sector is resilient and books will remain successful and appreciated print products.

→ www.intergraf.eu/events/shaping-the-future-of-print/book-conference-2021

→ www.intergraf.eu/events/directors-conference

2.7 EUROPEAN NETWORK AND PARTNERSHIPS

EUROPEAN NETWORK

An important facet of Intergraf's work is to **collaborate** with other **European associations** in Brussels to achieve our common goals. To these ends, we are a member of many different **European networks** which deal with different topics. Within these networks, relevant information is shared between associations and **joint lobbying actions** are undertaken as a result of this collaboration. In order to effectively influence EU policy, such contacts are crucial. Together, our voices can be louder. The printing industry is part of Europe's wider manufacturing sector, its products provide services for many sectors and serve citizens and businesses everyday. A fundamental asset of the printing industry is its workforce and its skills. For this reason it is important to **share knowledge** and **best practices** among different organizations to keep the sector dynamic and respond to the market needs. To ensure the **competitiveness** of the sector in Europe, we must work together to promote the value of print products and inspire future generations. For instance, Intergraf is part of the **Print Media Group (PMG)**, an informal network representing publishers, printers, paper and envelop manufacturers, postal operators, direct mail operators and advertisers. Our group provides European decision makers with an understanding of the sector's values and the role it plays in culture, society and the economy.

Packaging Ink Joint
Industry Task Force
PIJITF

PMG
Print Media Group

esvoc EUROPEAN SOLVENTS
VOC MANAGEMENT GROUP

#INDUSTRY4EUROPE

EUROPEN
The European Organization for Packaging and the Environment

**EUROPEAN
EMPLOYERS
NETWORK (EEN)**

EGIN

CheMI

BUSINESSEUROPE

→ www.intergraf.eu/about-us/european-networks

PARTNERSHIPS

A key value of Intergraf is also its **partnerships**.

Intergraf shares with **FTA Europe**, its sister association, the same Secretariat since 2015. FTA Europe represents the flexographic printing sector. Both associations support their industry on the topic of food packaging. FTA Europe organises the Diamond Awards, a key event recognising excellent works printed with flexo technology. The Diamond Awards 2022 took place in Milan, Italy, and welcomed more than 370 participants. Intergraf collaborates also with **Smithers** on a multitude of activities since 2013. Smithers is the global authority on the packaging, paper and printing industry supply chains. Smithers delivers us in-depth market data, as well as technical and business information. Moreover, Intergraf works regularly with **Uni Europa Graphical** since 2013. We work together mainly on sectoral trends, digitisation and skills and we co-coordinate the Print Your Future project. Finally, we collaborate with **WPCF** (World Print & Communication Forum). Intergraf is a funding member of this leading collaborative platform for the world's major national and transnational printing associations. We also administer the platform's Secretariat.

FTA
EUROPE WE ARE FLEXO

SMITHERS

UNI europa
graphical &
packaging
global
union

upcf

→ www.fta-europe.eu

→ www.smithers.com

→ www.uni-europa.org

→ www.worldprintforum.org

SECURITY PRINTING

2.8 INTERGRAF CURRENCY+IDENTITY

Intergraf Currency+Identity connects technological innovators and institutional end users since 1976. It is an event like no other! A tight-knit **community** of experts actively building tomorrow's currency+identity ecosystem. The Conference and Exhibition are open exclusively to security printers, suppliers to security printers, central banks, government authorities, law enforcement and industry-specific digital solution providers. It provides **opportunities** to meet colleagues and customers, and to establish new contacts from across the world. Hundreds of participants participated in our 2022 **in-person** event that took place in Lyon, France, in April 2022. With **800+ participants** from **55 countries** and **98 exhibitors**, this year's event was a great success!

The next Intergraf Currency+Identity will take place in October 2023 in Bilbao, Spain. Intergraf members enjoy **discounted registration fees**. Stay tuned!

→ www.intergrafconference.com



2.9 INTERGRAF CERTIFICATION



ISO 14298



CWA 15374

The year 2021 to 2022 was another year of reduced travel possibilities and thus many remote audits were conducted for Intergraf's **ISO 14298** and **CWA 15374**. Intergraf certifications last for 3 years with one certification audit and 2 control audits in each 3 year cycle. In 2021 the Intergraf Certification Requirements (ICR) have been thoroughly reviewed. The new version of the ICR has been made available to all certified companies in January 2022. Next to the regular **auditor meeting** in which any changes and improvements to all certification documentation are discussed Intergraf has also put in place a **Security Printers Expert Committee** with representatives of certified companies. This Committee is giving feedback on the requirements and thus ensuring that the ICR is always up to date and all requirements are adequately formulated. The Expert Committee has met twice over the last year. The second meeting was on the occasion of the **Intergraf Currency+Identity** Conference and Exhibition in Lyon in April 2022. A workshop for certified companies was also organised which gives security managers in certified companies the possibility to exchange with their peers, learn from each other and ask specific questions to the Intergraf auditing organisations. Intergraf works with two certification organisations: **VPGI** in the Netherlands and **SQS** in Switzerland. Intergraf currently has **158** production sites certified in **55** countries.

→ www.intergrafconference.com/index.php/intergraf-certification





PART 3: **GOVERNANCE**

3.1. SECRETARIAT

EUROPEAN AFFAIRS



Beatrice Klose
Secretary General



Laetitia Reynaud
Policy Advisor



Alison Grace
Communications &
Policy Officer



Despoina Melissinou
Membership & Events
Officer
(Intergraf and FTA Europe)

ACCOUNTING, HR AND ADMINISTRATION

- **Reka Sipos**, HR & Administration Officer
- **Sanaâ Riffi Tamsamani-d'Hennezel**,
Certified Expert-Accountant ITAA

SECURITY PRINTING

Intergraf's **Security Printing Team** organises the Intergraf Currency+Identity Event and manages Intergraf's Certifications.

- **Doris Schulz-Pätzold**, Customer Relations & Certification Manager
- **Simona Barbulescu**, Event Coordinator
- **Corinne Durand**, Web & Digital Communications Officer
- **Cristina Munteanu**, Exhibition Coordinator
- **Sophie Plattard**, Event Assistant
- **Manfred Goretzki**, Editor of Infosecura Magazine

MATERNITY COVER



Irene Paolinelli
Communications &
Policy Officer

December 2021 - June 2022

→ www.intergraf.eu/about-us/team

3.2. MEMBERSHIP POSSIBILITIES

NETWORK WITH GLOBAL PRINT EXPERTS

- Learn from your European and global peers
- Contribute to industry development
- Attend international events
- Share your knowledge

SHAPE THE EUROPEAN POLICY AGENDA

- Understand EU policies and their impact
- Learn about legislative developments
- Influence EU policy
- Find partners for transnational consortia

ACCESS EXCLUSIVE PUBLICATIONS

- Annual Economic Report
- Market reports on printing industry sub-sectors
- Policy factsheets and guides
- Economic news
- Monthly trade newsletter

→ **Membership of Intergraf** is open to any national printing association based in Europe.

→ **Associate Membership** is open to any printing or supplying company or association in Europe that seeks enhanced European collaboration without becoming a full member of Intergraf. Non European companies may get in touch with us to discuss possibilities to collaborate.

→ All you need to do is **contact a member of the Intergraf team** to discuss the details!

→ www.intergraf.eu/members/member-benefits

3.3 NEW ASSOCIATE MEMBERS

 **HEIDELBERG**



KOENIG & BAUER

KURZ 

Quad 

→ www.intergraf.eu/members/associate-members

3.4 MEMBERS

Austria **PROPAK**

Belgium **FEBELGRA**

Bulgaria **PRINTING INDUSTRY UNION OF BULGARIA**

Denmark **GRAKOM**

Estonia **ASSOCIATION OF ESTONIAN PRINTING AND PACKAGING INDUSTRY**

Finland **FINNISH PRINTING ASSOCIATION**

France **UNIIC**

Germany **BVDM**

Hungary **FEDPRINT**

Italy **ASSOGRAFICI**

Latvia **LATVIAN PRINTERS ASSOCIATION**

Lithuania **LISPA**

Luxembourg **AMIL**

The Netherlands **KVGO**

Norway **NORSK INDUSTRI**

Portugal **APIGRAF**

Sweden **GRAFISKA FÖRETAGEN**

Switzerland **VISCOM**

Switzerland **VSD**

United Kingdom **BPIF**



3.5 ASSOCIATE MEMBERS

ACINGA, Italy

FTA EUROPE, Belgium

FNMT, Spain

HEIDELBERG, Germany

HP, Israel

ICA, United Kingdom

KOENIG & BAUER, Germany

KURZ, Germany

PWPW, Poland

QUAD EUROPE

→ www.intergraf.eu/members/members

→ www.intergraf.eu/members/associate-members



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