



INTERGRAF ACTIVITY REPORT

June 2022 - June 2023

EUROPEAN AFFAIRS TEAM

THE EUROPEAN PRINTING INDUSTRY



110.000
PRINTING COMPANIES



95%
FEWER THAN 20 EMPLOYEES



610.000
EMPLOYEES



€70 BILLION
TURNOVER (EU27+UK; CH; NO)



€1.3 BILLION
POSITIVE TRADE BALANCE

FOREWORD

In 2022, the business landscape witnessed a gradual return to normalcy after the disruptions caused by the global pandemic. The year marked a turning point as the print industry adapted to the new normal and found innovative ways to navigate the challenges that lay ahead. The year 2022 served as a pivotal period in the recovery process, highlighting the resilience and adaptability of the graphical sector as it forged ahead into a more predictable future.

However, new challenges emerged. Due to the ongoing war in Ukraine, the energy crisis has become a significant threat, endangering the production and availability of essential printed goods. As an industry that serves both citizens and businesses, even during times of crisis, the printing sector plays an integral role in meeting society's needs, particularly those of vulnerable groups. Unfortunately, many printing companies, especially SMEs, find themselves grappling with the consequences of soaring energy and raw material costs. We have taken proactive steps to draw policymakers' attention to this critical issue, as well as monitored EU initiatives and shared valuable information on support schemes designed to mitigate the effects of the crisis.

Sustainability is a pressing concern in 2022 & 2023 and will remain so in years to come. In connection with this, Intergraf actively engaged in discussions and collaborations with esteemed international publisher associations to promote sustainable practices in book, magazine, and newspaper production, and with international printing associations to exchange knowledge and experience. In a significant victory for the Intergraf EU advocacy team, its 10-year advocacy efforts paid off with the inclusion of printed products in the scope of the new deforestation-free products Regulation at the end of 2022. This means that all operators importing listed commodities and products on the European market, with potential ties to global deforestation, will now be subject to mandatory due diligence

rules. Intergraf engaged with the European Parliament to shed light on the need for this inclusion, ensuring that millions of euros worth of printed products will no longer enter the European market without protection from illegal logging. This achievement is crucial for preserving the reputation of our industry in Europe and the perception of our products.

In 2023, the EU decision-makers focused heavily on the graphical and related sectors. We reported on the Commission's proposal to enhance harmonization among Member States by directly applying packaging requirements to all operators, eliminating the need for individual national interpretations. We are concerned by the latest Commission's provision allowing EU countries to offer medical leaflets solely in digital format. We eagerly anticipate the forthcoming discussions and amendments to this proposal within the European Parliament and European Council.

We have joined forces with other actors in the value chain to promote and advocate for the circularity of forest-based materials including print & packaging.

The June 2024 European elections are set to significantly reshuffle the Brussels political ecosystem, and Intergraf is eager to work closely with the future Parliament and Commission to influence the legislation on medical leaflets.

In the past year, we also organised several successful conferences, including the Directors' Conference in Vienna, Shaping the Future with Packaging in Brussels, and Print Matters for the Future in Riga. Our C + I team is getting ready for the Currency + Identity Conference 2023 in Bilbao in full gear.

Amidst the challenging landscape that the print industry currently faces, we extend our heartfelt appreciation to our members for their unwavering support.



Ulrich Stetter
President



Beatrice Klose
Secretary General

2022-23

IN NUMBERS



16
**EXTERNAL
PRESENTATIONS
GIVEN**



8
**CONFERENCES
ORGANISED**

GENERAL ASSEMBLY
PRINT MATTERS FOR THE FUTURE
DIRECTORS' CONFERENCE
SHAPING THE FUTURE OF PACKAGING
ENERGY CRISIS WEBINAR
PAPER MARKET WEBINAR
BUSINESS CONTINUITY
MANAGEMENT WEBINARS (2X)

UPCOMING: CURRENCY +IDENTITY CONFERENCE



11
**WORKING
GROUP
MEETINGS**



417
**EVENT
PARTICIPANTS**
+130 SINCE 2021/2022



5
**BOARD
MEETINGS**



4
**STEERING
COMMITTEE
MEETINGS**



22
FULL
MEMBERS
+2 IN 2022



17
ASSOCIATE
MEMBERS
+5 IN 2022/2023



510+
NEWSLETTER
SUBSCRIBERS



1.5
BILLION EUR
WORTH OF IMPORTED PRINTED
PRODUCTS NOW SUBJECT
TO DEFORESTATION DUE
DILLIGENCE



112
MEETINGS
ATTENDED



15
PRESS
RELEASES



4,346
SOCIAL
MEDIA
FOLLOWERS
2379 AISBL LINKEDIN
1663 C+I LINKEDIN
304 TWITTER



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PART 1: KEY TOPICS

“During these challenging times, SMEs face unique difficulties alongside the common struggles shared by all sectors and companies. With limited management capacity, it becomes incredibly stressful for SMEs to stay updated and informed amidst daily changes, regulations, and requirements. Print company managers are burdened with the responsibility of taking care of customers and employees, leaving little time to address the actual challenges and additional problems connected to the energy crisis.

Ulrich Stetter, President

PART 1.1 ENERGY

ENERGY

The energy crisis, combined with the pandemic and rising paper prices, has severely impacted printers in Europe. This threatens the supply of essential printed products across all markets. Support from legislators is needed to safeguard continuous production.

Printers are vital for economy

Intergraf has drawn the policymakers' attention to the fact that the energy crisis endangers the supply of printed products, including schoolbooks, advertising materials, labels, packaging, and publications like books and newspapers. The printing industry serves citizens and businesses, providing essential items even during crises, as printed goods are indispensable for citizens and are particularly important for vulnerable groups at a time of economic turmoil.

SMEs hit hard by energy crisis

With soaring energy and raw material costs, many printing companies, mostly SMEs, faced an unsustainable situation. We called on legislators to extend support beyond large energy-intensive sectors to safeguard Europe's critical infrastructures. The printing industry, reliant on energy-intensive materials, plays a vital role in supplying essential products to society.

At Intergraf, we monitored EU initiatives and provided information on support schemes responding to the crisis. In particular, the shaping of a regulation on an emergency intervention including measures on electricity consumption reduction, revenue caps for lowcost power generation, solidarity levy from fossil fuel companies, and the possibility for Member States to temporarily set a price for the supply of electricity that is below cost.

Intergraf organised ad-hoc meetings between members and a dedicated **webinar with SMEUnited** as guest speaker to address the crisis.



The EU has to use all available energy and electricity sources to increase energy supply and reduce price pressure. At the same time, Europe has to facilitate a transition to more sustainable energy sources."

Gerhard Huemer, SMEUnited



Photo: Promotion for Intergraf event, Navigating the Energy Crisis for SMEs, November 2022.

“

Reducing carbon emissions will increasingly be a requirement from European legislation. The demand for the reduction of the carbon footprint of printed products will increase. The printing industry is now not only equipped with a credible approach to assess the carbon footprint of its products, but it also provides the market with a procedure to prioritise the reduction over the compensation of carbon emissions of its products.

Carsten Bøg, Member of Intergraf Environmental Committee

PART 1.2

CARBON FOOTPRINT

CARBON FOOTPRINT

Advocacy state of play

Reiterating the urgency of addressing environmental concerns, **Intergraf is actively engaging in discussions with international publisher associations** including the International Publishers Association, FIPP, and WanIfra regarding the assessment of carbon footprint in the production of books, magazines, and newspapers. Notably, Intergraf has received support from the renowned publishing company Bertelsmann, which aims to contribute to the global promotion of Intergraf's approach.

Moreover, **Intergraf has initiated a valuable collaboration with PRINTING United Alliance**, the printing association in the United States. Despite the absence of stringent regulatory pressure in the US compared to Europe, major brands are gradually recognizing the significance of carbon calculations within their supply chains.

The Intergraf approach encompasses two crucial components: **the Intergraf Recommendations on CO2 emissions calculation and the Intergraf Roadmap on CO2 calculation, reduction, and compensation in the printing industry**. While the first provides a standard on how to calculate carbon emissions for our industry, the second offers a concrete procedure to printers as well as print buyers to categorise parameters that influence

carbon emissions and to prioritise reduction measures of emissions.

Intergraf goes further in its support of members by promoting **two carbon calculators developed in alignment with the Intergraf Recommendations: Klimainitiative and ClimateCalc**. These calculators empower industry stakeholders to measure and track their carbon emissions accurately, fostering transparency and accountability within the printing sector.

Intergraf welcomes the Commission's proposed Green Claims Directive, which addresses environmental claims in business-to-consumer practices. Intergraf's work on carbon footprint and ongoing discussions on environmental schemes will assist printing companies in complying with future green claim requirements.

Looking ahead, Intergraf anticipates that the **carbon footprint will remain a top priority in 2024 and the years to come**. By proactively advocating for sustainable practices, collaborating with international associations and partners, and providing valuable resources, Intergraf is determined to drive meaningful change in the printing industry's approach to carbon emissions.

“

Our work on carbon footprint and future approach to assessing environmental schemes aim to support printing companies, their customers, and other actors in the value chain to substantiate their environmental claims related to printed products and avoid greenwashing in the industry.

Laetitia Reynaud, Senior Policy & Economic Advisor

“*The European Commission’s new proposed far-reaching regulation on packaging is a major step forward in the EU’s efforts to create a more sustainable packaging industry in Europe. It will have a significant impact on the printing and packaging industry, which will need to find new and innovative ways to reduce waste and increase recycling.*”

Beatrice Klose, Secretary General

PART 1.3

PACKAGING

PACKAGING

The packaging sector is growing, with a forecasted annual growth rate of 1.7% until 2027. New regulations are also driving rapid change and innovation.

Packaging & waste legislation

In late 2022, the Commission proposed replacing the current Packaging and Packaging Waste Directive with a Regulation. This would directly apply the requirements to all operators, eliminating the need for national interpretation and ensuring better harmonization among Member States. The proposal includes targets for minimum recycled content in plastic packaging, as well as criteria for assessing recyclability based on design for recycling. Recyclable content will be categorized using a grade system (A to E), which will determine the Extended Producer Responsibility fees for packaging producers. Starting from 2030, non-recyclable packaging (grade E) will be prohibited. The proposal also aims to introduce a standardized labeling system for packaging disposal. The proposal is undergoing the regular scrutiny process in 2023-2024.

Food contact materials

For several years now, the Commission is due to present a revision of the regulatory framework on food contact, including providing new requirements on printed food contact materials. Early 2023, the Commission has launched a public consultation to which Intergraf contributed. While confirming the support of industry to harmonised rules in Europe, Intergraf called for adapting the rules to SMEs and reminded that safety is the responsibility of the whole supply chain and not only to the converting and printing companies. As the intention of the Commission is to address sustainability issues, Intergraf reminded that safety should be prioritised. The Commission aims to present the revision proposal by the end of 2023, but indications suggest it may be delayed until 2024.

Mineral oil in printing inks

Some Member States, like Germany and France, are considering regulations regarding mineral oil. Germany's draft Mineral Oil Ordinance, which aimed to prevent mineral oil migration into food packaging, was not approved by the Bundesrat in December 2022. Intergraf's German member, bvdm, opposed this proposed ordinance. In France, legislation has been adopted to restrict the use of mineral oils in inks for packaging and printed materials. Intergraf's French member, UNIIC, is challenging this legislation before the Council of State, seeking revisions to align it with the industry's reality. The issues raised include the lack of precise mineral oil definition and analytical methodology in the legislation, as well as unworkable thresholds for certain processes.

On 9 & 10 March Intergraf and FTA Europe co-organized an event called "Shaping the Future with Packaging." The event brought together almost 120 leaders from Europe's packaging industry from 18 different countries for two days of learning and collaboration. The main focus was on the necessity for innovation and the role companies play in the supply chain.



Photo: Panel discussion at Shaping the Future with Packaging, March 2023

“*To be truly inclusive (or “fair”), horizontal legislation such as the Consumer Rights Directive must consider non-digital forms of communication as part of the full consumer experience. Not doing so creates a loophole in European consumer law, through which companies and service providers routinely treat consumers unfairly.*”

Intergraf position paper on digital fairness for consumers (December 2022)

PART 1.4

PROMOTING PRINT

PROMOTING PRINT

We live in a digital world in which print remains essential. Printed products surround us, adding value and expression to our lives.

Our economy and society does not function without printed products. Can you imagine a supermarket, pharmacy, or library without print? Although this may seem obvious, we need to regularly remind both policymakers and wider society of it.

Challenging 'digital first'

Accelerating Europe's digital transformation is a central theme for the European Union. Alongside the green transition, references to the digital transition appear in all new EU legislation.

Digital transformation is central to Europe's future. But we must remember that digital is not a neutral starting point.

This understanding should be reflected in EU legislation that refers to the digital transition. But it is not. Print is often completely missing from the debate, or its importance unjustly diminished. **Intergraf challenges such 'digital first' or 'digital only' approaches.**

For example, this year, we have published:

- Joint statement: 'Digital by default' or 'digital only' approaches in European legislation are not neutral (Intergraf and UNI Europa Graphical)
- Joint Statement: Machinery Directive (Intergraf and UNI Europa Graphical)
- Public consultation and position paper: Digital fairness for consumers (Intergraf)
- Press release: Medical leaflets (Intergraf)
- Joint statement: Digital fairness via the Consumer Rights Directive (Intergraf with Keep Me Posted EU)

Promoting printed books

Printed books must be included for a balanced information diet - both in our children's schools and in our own lifelong learning efforts.

To promote the enduring value of printed books, we worked in March 2023 with the Federation of European Publishers and Cepi (paper industry) on:

- Joint statement: Books as a driver of Europe's knowledge economy (Intergraf, FEP, and Cepi)



Photo: Anne Bergman-Tahon, Director of the Federation of European Publishers (FEP) and Beatrice Klose, Secretary General of Intergraf. Launching the joint statement 'Books as a driver of Europe's knowledge economy' at the European Parliament on 21 March 2023.

“*The print industry is moving in the right direction to become a fully circular operation. I believe we must establish common standards for calculating and reporting on the environmental impact of print. We must also educate our customers and the public on the true impact of print on the environment compared with other communication methods.*

Tom Maskill, Winner of Intergraf Young Talent Award 2022

How Does the Next Generation See Print?

Tom Maskill – Sales & Marketing Director, Webmart

PART 1.5 YOUNG TALENT AWARD

YOUNG TALENT AWARD

The Intergraf Young Talent Award was established in 2017 to provide a platform for the voices of the next generation of print professionals. Each year, our esteemed panel of experts selects one exceptional submission that showcases innovative ideas and creative solutions.

Intergraf is committed to extending its support to young individuals in the printing industry and thus inspire and engage them in working on significant topics that are relevant to our industry. As part of this initiative, Intergraf awards a grant to a deserving student, apprentice, or young worker hailing from one of the member countries. The application process is open to individuals under the age of 25 who are pursuing studies in print media or related subjects, undergoing training, or actively employed within the printing industry. This endeavour by Intergraf serves as a proactive measure to foster growth and development of young professionals, encouraging their participation and contribution to the field of printing and digital communication.

Winners 2023

This year's focus was digitalisation, which is among the top priorities on the EU agenda. Candidates were invited to respond to the following question:

What is print's place in a digital world?

The **first place** was awarded to **Manon Lassaigue**, **Loïc Voisin** won **second place**, and **Mário Mendes Alexandre** won **third place**. Notably, all three top submissions in 2023 hail from France.

“Printing has a bright future ahead of it, despite the impact digitalization has on our lives. Its authenticity and concrete nature remain an asset in learning and memorization. Printing also complements digitalization and is advantageous in brand strategy. Despite younger generations' interest in new technologies, printing is still an essential element of communication for them. The complementarity and synergy of printing and digitalization promise companies positive results in achieving their objectives.”

Manon Lassaigue

Winner of Intergraf Young Talent Award 2023

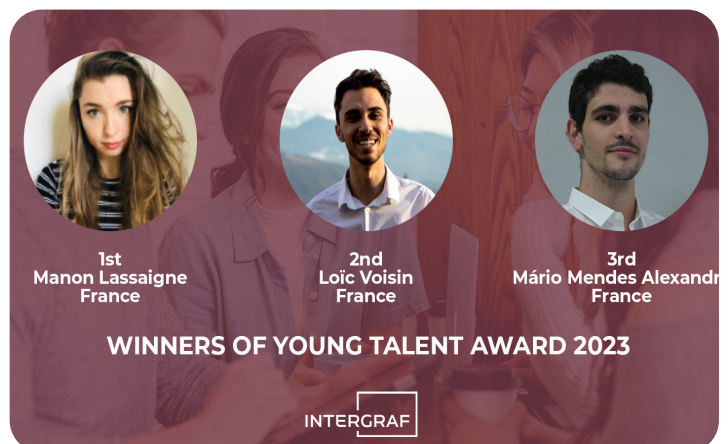


Photo: Image of 2023 Intergraf Young Talent Award Finalists





ADVOCACY

“

With the extension of the scope to printed products, the EU's new Deforestation Regulation closes a significant environmental loophole and will restore some degree of fair competition between European printers and their non-EU competitors – in particular from low-cost countries.

Beatrice Klose, Secretary General

2.1 ADVOCATING FOR PRINT

Note from EU affairs team

The EU advocacy team of Intergraf represents its members' interests and priorities within the EU political ecosphere, influencing decision-making, and thus securing the continuous prosperity of the European graphical sector. The decisions of the EU institutions can directly affect the printers in Member States, thus it is crucial to ensure that the membership's concerns and perspectives are effectively communicated to policymakers. Moreover, active engagement with EU institutions allows Intergraf to stay informed about upcoming regulations, enabling its members to adapt and seize potential benefits in time.

NB! The impending 2024 European elections are poised to influence Intergraf's advocacy activities.

Advocacy success in 2022

Intergraf saw its 10-year advocacy efforts succeed on the **new deforestation-free products** Regulation end of 2022 with the inclusion of printed products in the scope of the legislation. According to the new rules, all operators importing listed commodities and products on the European market that can generate global deforestation will be subject to mandatory due diligence rules. As for the existing EU Timber Regulation, printed products were not covered by the scope in the proposal from the Commission. Intergraf successfully approached the European Parliament and convinced several political parties of the need to include printed products.

Without this law, millions of euros worth of printed products would continue entering the European market without protection from illegal logging. Intergraf is particularly proud of this achievement as illegal logging and deforestation caused by imported printed products blemish the reputation of our industry in Europe and the image of our products.



Sustainability

Sustainability remains a pressing concern in 2022 & 2023, and Intergraf continues to closely monitor the implementation of the Green Deal and other initiatives by the Commission. For instance, the newly proposed **Directive on substantiating green claims** is in line with the work of Intergraf on promoting sustainable practices in the printing industry. Intergraf will also continue monitoring and working on sustainability issues impacting the industry, including chemicals, industrial emissions, packaging waste or restrictions on mineral oil.

Pressure on print 2023

In its new proposal on medicinal products, the Commission grants **the possibility for EU countries to allow for the leaflet to be provided only in a digital format**. The Commission however stipulates that Member States allowing the provision of electronic leaflets will have to guarantee the patient's right to a printed copy of the leaflet upon request and free of charge. The proposal will now be discussed and amended by the European Parliament and European Council.

Intergraf collaborates with MLPS (Medical Leaflets=Patient Safety), a coalition of healthcare packaging maker, to support the use of paper leaflets.

INFORMING

2.2 ECONOMIC INFORMATION

Intergraf's flagship publication is the **Annual Economic Report**, published every year in May/June. This report is free of charge for Intergraf members, and is available to be purchased by non-members.

The Intergraf Annual Economic Report presents an extensive statistical overview of the European graphic industry (EU27 + the UK, Norway, Switzerland and Iceland). It contains an overview of all relevant data - predominantly from Eurostat and our members - on the printing industry and on other sectors of relevance, such as ink, paper, publishing, books, press, energy, and postal. Our report also features a **4-year forecast** from our market research partner Smithers, the **European Print Market Review**.

To provide our members with more timely updates, we also distribute the **Economic News** newsletter every month. This shorter communication is supplemented three times per year by the **Economic Newsletter**, which gives more extended information.

2.3 FACTSHEETS

We produce **factsheets** for all of the most important issues. Factsheets give a brief overview of a topic, and are only available for Intergraf members.

The latest Factsheets published or updated are:

- Digital Fairness
- Doordrops
- Due Dilligence
- Taxonomy
- Medical Leaflets

Order our 2023 Economic Report here

www.intergraf.eu/communications/annual-economic-report

New format

Intergraf is happy to present the revamped Economic Report, redesigned to provide seamless user experience and better readability. The updated report will be available for **download**. The accompanying brochure will be available physically.



2.4 COMMUNICATIONS

Intergraf's mission is to **promote and protect** the printing industry at European level. We communicate our messages via a growing array of channels, and to a larger following than ever.

Newsletters

- Newsflash
- News in Brief
- Market News (ad hoc)
- Economic News
- Regulatory News

Reports

- Activity Report
- Economic Report
- European Packaging Market Report

Websites

- www.intergraf.eu
- www.intergrafconference.com
- www.printyourfuture.eu

Social Media

- LinkedIn (2x)
- Twitter

Policy Communications

- Factsheets

2.5 PRESS

Intergraf is recognised as a **leading voice** for the European printing industry.

With the energy and paper crises last year, press activity was the highest it has ever been, with requests for comments and interviews from major outlets covering print. Now that these crises have (to some extent) slowed, so has our press activity.

Intergraf's work continues to be covered regularly in trade press across Europe, and we have seen more communication about our activities from our member associations and associate members. **Thank you for your support!**

This year, our work has been featured by, for example:



Follow us!



2.6 CAMPAIGNS



Keep Me Posted EU

Keep Me Posted EU is the European campaign protecting your right to choose how to be contacted with important information: on paper or digitally.

As Europe's digital transition intensifies, more and more companies, service providers, and governments are encouraging digital over physical communications. This is a problem for the tens of millions of consumers in Europe who cannot, or do not want to, receive communications online. Keep Me Posted EU campaigns for their **right to choose**.



Two Sides

The printing industry's primary raw material is **renewable** and its recyclable products are part of Europe's **circular economy**. But misconceptions about the environmental credentials of our sector and its products are prevalent.

The campaign **Two Sides** works to combat common misconceptions about paper, print, and paper packaging. The campaign provides verifiable information on why print and paper is an attractive, practical, and sustainable mode of communication.



The Future of Reading

There is a **wealth of research** proving how important it is to read on paper rather than on a screen. It is better for comprehension, concentration, retention, and deep reading. It is also good for our mental health.

Intergraf shares the results of such research with EU policymakers and our wider network whenever opportunities arise. The digital transition brings with it many opportunities, but there are also threats that need to be better considered. The threat to reading and literacy is one of them. Reading is an activity that is often better carried out on paper.



Circular Choices

The Cross-sectoral Coalition for Circular Choices for the EU's Bioeconomy represents **a sustainable, circular, and integrated European value chain which will be crucial to enable the EU to reach the net zero goal by 2050.** Among other aspects, the Coalition aims to promote sustainability and a circular economy, focusing on renewable wood and fiber supply, strategic autonomy, and the recognition of wood-based products in the circular bioeconomy. The Coalition is committed to the sustainable management of forests, the delivery of sustainable products, the transition to net zero and the creation of long-term jobs.

2.7 SOCIAL DIALOGUE

Intergraf has been the **European Social Partner** representing employers in the graphical sector since 2013. We meet regularly with our counterpart trade union, UNI Europa Graphical, and the European Commission to discuss employment and social affairs issues affecting our sector.

Our most recent agreements include:

- **Comments to the ongoing review process of the 2006/42/EC Machinery Directive**
- **'Digital by Default' or 'Digital Only' approaches in European Legislation are not Neutral**

Eurofound Representativeness Study

As we speak on behalf of the whole industry, it is important for Intergraf to be representative of printers in Europe. To ensure this is the case, the EU research agency, Eurofound, periodically conducts a representativeness study of our sector. This is currently in progress, with an expected publication date of 2024.

EU Projects

Intergraf and UNI Europa Graphical co-coordinated the EU project **Print Your Future**, which aimed to enhance the sector's attractiveness and recruitment. For more information, visit www.printyourfuture.eu. The project ended in January 2022.

UNI Europa Graphical is very helpful in advocacy against the "digital only" approach. The union contacted Members of the European Parliament to warn them not to discriminate against print.

“It is important for employers to have a good dialogue with worker organisations, and to find consensus on the issues that matter for our sector. Such partnerships help us to thrive.”

Monica Scorzino, Chair of the Social Dialogue Committee for the Graphical Sector

NETWORKING

2.8 EVENTS

Following a turbulent few years without in-person events, Intergraf's calendar has more or less returned to normal.

This year, we organised events in Sweden, Belgium, Austria, Latvia, and online. In May 2022, Intergraf members met in Stockholm for the **General Assembly** and **Print Matters for the Future** conference. In September, Directors met in Vienna for the **Directors' Conference**. We met online in November for a webinar on **navigating the energy crisis for SMEs**. In March 2023, we organised **Shaping the Future with Packaging** in Brussels.

There is more to come in 2023-24! We look forward to seeing you at our upcoming events.



Photo: Intergraf Directors' Conference, Vienna, September 2022



Photo: Intergraf Shaping the Future with Packaging conference, Brussels, March 2023



Photo: Intergraf General Assembly, Stockholm, May 2022



Photo: Intergraf Shaping the Future with Packaging conference, Brussels, March 2023

2.9 EUROPEAN NETWORK

One of Intergraf's key strengths are our **relationships at European level**. In order to effectively influence EU policy, such contacts are critical - both within the European institutions and outside of them.

The printing industry does not exist in isolation. We are a user of products and services from, as well as a supplier to, many other sectors. We also operate within the same wider social and economic system. Because of this, the policy areas Intergraf covers are wide-ranging, as well as their content being vast and often complex.

Pooling knowledge and resources between different associations in **European platforms, coalitions, and networks** allows us to be more effective advocates for the printing industry. As well as regular contacts with individual associations, we are a member of, or interact regularly with, the following platforms at European level:

- Print Media Group (PMG)
- Coalition for Circular Choices
- Industry4Europe Coalition
- European Paper Recycling Council (EPRC)
- Packaging Chain Forum
- Packaging Ink Joint Industry Task Force (PIJITF)
- XSG (cross sector group) on food contact materials
- European Solvents Downstream Users Coordination Group (ESVOC)
- European Platform for Chemicals-Using Manufacturing Industries (CheMI)
- BusinessEurope (e.g. European Employers Network)

2.10 PARTNERSHIPS

FTA EUROPE

Since 2015, Intergraf has shared its Secretariat in Brussels with its sister association **FTA Europe**. FTA Europe represents and promotes the flexography printing sector.



Photo: FTA Europe Diamond Awards, Milan, May 2022

A key activity of FTA Europe are the **Diamond Awards**, which recognises exceptional flexo printers from across Europe and beyond every other year. The latest **FTA Europe Diamond Awards** took place in Milan on 5 May 2022. The event was a great success: 370 guests attended to celebrate the best of the European flexo industry.

The next **FTA Europe Diamond Awards** will take place in Düsseldorf, Germany on Thursday 30 May 2024.

Intergraf joined forces with FTA Europe on the event **Shaping the Future with Packaging** on 9 and 10 March 2023. This event welcomed almost 120 guests to Brussels to hear more about the latest developments in the packaging sector.

Our two associations will continue to work closely together in the **Task Force on Food Contact Materials**, due to a shared interest in the food packaging sector.

→ www.fta-europe.eu

SMITHERS

Intergraf has collaborated with **Smithers** on a multitude of activities since our partnership began in 2013. Smithers is the **global authority** on the packaging, paper, and printing industry supply chains. We work primarily with the division **Smithers Information**, which delivers in-depth market data, as well as technical and business information.

Every year, Smithers contributes a review of the European print market to the **Intergraf Annual Economic Report**, supplementing the information provided by us and our members. We also work together on the event series: **Shaping the Future with Print** (focusing in 2023 on the packaging market), for which Smithers provides a detailed market report. Past topics have included commercial print, packaging, magazines, direct mail, and books. A representative from Smithers presents their data at our events.

→ www.smithers.com

UNI EUROPA GRAPHICAL

As the **European Social Partner** representing employers in the graphical sector, Intergraf works regularly with our counterpart trade union, **UNI Europa Graphical**. Since 2013, we have engaged in sectoral **Social Dialogue**, supported by the European Commission. In 2019, we published a new Work Programme, committing to work on sectoral trends, digitisation, demographics, skills, new business models, state aid and unfair competition, and image and environment.

2020 also saw the launch of our joint project (funded under Social Dialogue): **Print Your Future**. This project provided solutions to image and attractiveness issues affecting the graphical sector.

→ www.uni-europa.org

WORLD PRINT AND COMMUNICATION FORUM (WPCF)

Intergraf is a founding member of the **WPCF** (World Print & Communication Forum), the leading collaborative platform for the world's major national and transnational printing associations. We also administer the platform's **Secretariat**.

At the end of 2022, WPCF members met online to share information about their work and the state of the industry in each country. Following this meeting, the **WPCF 2022 Economic Report** was published, presenting key data about the global economy, print markets and focused country reports about WPCF members.



From time to time, WPCF supports Intergraf's **Print Matters for the Future** conference, adding a global perspective to our European event. In June 2023 at the Print Matters for the Future conference in Riga, Ford Bowers from PRINTING United Alliance presented current challenges and developments in the US market. The next WPCF meeting will take place in September 2023 in Bangkok, Thailand, on the occasion of Pack Print International.

→ www.worldprintforum.org

2.11 INTERGRAF CURRENCY+IDENTITY

INTERGRAF CURRENCY+IDENTITY

Intergraf Currency+Identity offers first-hand access to currency and identity solutions and products from the world's best security printers, suppliers, and industry-specific digital solution providers. It provides a unique, independent, non-profit platform for thought leaders, decision makers and technological innovators to share latest innovations and best practices.

The last event gathered 800+ delegates from no less than 327 institutions and 54 countries.

The next edition will take place in Bilbao, Spain on 18-20 October 2023 and promises three full days of interactive exchange and dialogue - the perfect environment to build meaningful connections.

Will you take part?

→ www.intergrafconference.com



2.12 INTERGRAF CERTIFICATION



ISO 14298



CWA 15374

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

Intergraf plays a key role in defining standards to promote and protect the interests of the security printing industry by offering ISO 14298 and CWA 15374 certification to security printers, hologram manufacturers and their suppliers.

In this way, Intergraf helps solution providers and institutional end users respond to the challenges they face in an increasingly competitive environment. And of course, also to certified companies, by providing them with a solid framework for the management of security printing processes.

From logical security to physical security to supply chain assurance, Intergraf ISO 14298 and CWA 15374 ensure that a set of requirements are met to guarantee a high level of security across all operations and processes, eliminating risk for customers and their products.

Over 160 production sites in 50+ countries across 6 continents are already reaping the benefits of Intergraf's certification.

Two independent certification bodies, VPGI (NL) and SQS (CH) carry out the audits on behalf of Intergraf worldwide.

Intergraf's Certification Workshops are offered regularly online and in physical form. Here, the certified companies and the end customers (such as governments, central banks, tendering authorities, etc.) are offered the opportunity to inform themselves about current topics and to exchange ideas within the peer group.

The next workshop will be held in Bilbao on 17.10.2023.

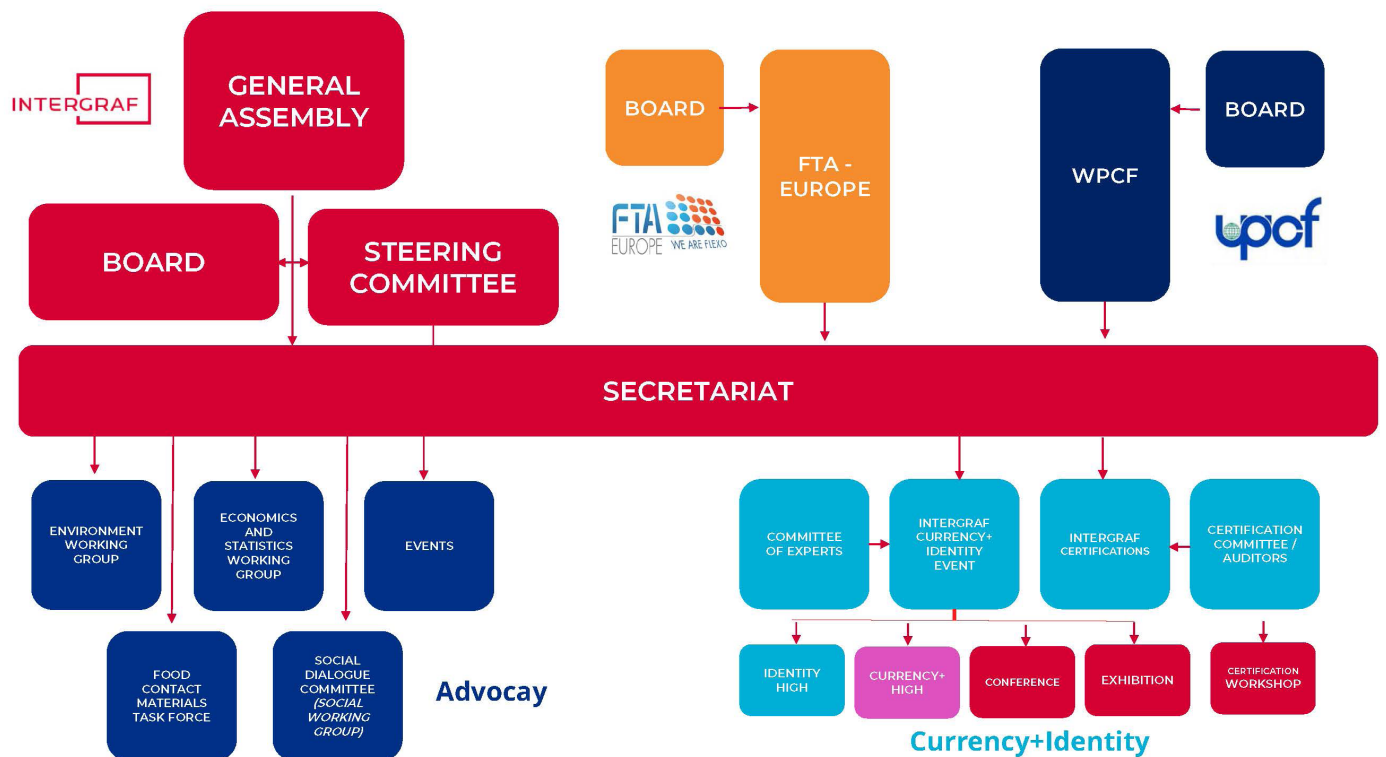


Photo: Intergraf Directors' Conference, Vienna, September 2022



PART 3: GOVERNANCE

3.1. WORKING STRUCTURE



The strategic direction of Intergraf is set by the **Board**, a group of ten company representatives appointed by Intergraf's member associations. Countries currently represented are **Denmark, Germany, Hungary, Italy, Latvia, the Netherlands, Sweden, the UK and Estonia**. FTA Europe also has a seat on the Board.

Decisions of the Board are carried out by the **Steering Committee**, a body comprising of Directors and other high-level representatives from national printing associations. Countries currently represented are **Denmark, Germany, Italy, Portugal, Sweden, France and Estonia**.

The Intergraf **Secretariat** is made up of three teams: European Affairs, Security Printing, and Accounting, HR & Administration. All three teams are managed by the Secretary General. The Secretariat carries out the day-to-day work of the association.

Intergraf chairs three active **Working Groups**:

- » **Economics and Statistics Working Group**
- » **Environment Working Group**
- » **Food Contact Materials Task Force**

These groups contain experts from our national member associations. They meet regularly to discuss all relevant EU policy issues. Social affairs issues are discussed amongst members of the **Social Dialogue Committee**.

Intergraf's annual **General Assembly** is the association's main decision-making body, where members approve the work and finances of Intergraf. The General Assembly also grants discharge to the Board and Steering Committee to carry out their work during the upcoming year.

→ www.intergraf.eu/about-us/governance

3.2. SECRETARIAT

EUROPEAN AFFAIRS



Beatrice Klose
Secretary General



Laetitia Reynaud
Senior Policy Adviser



Sergejs Mikaeljans
Communications Officer

ACCOUNTING, HR AND ADMINISTRATION

- **Reka Sipos**, HR & Administration Officer (part-time)
- **Sanaâ Riffi Tamsamani**, Certified Expert-Accountant ITAA (part-time)

SECURITY PRINTING

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

- **Doris Schulz-Pätzold**, Customer Relations & Certification Director
- **Simona Barbulescu**, Event Manager
- **Elsa Lopez**, Web & Digital Officer
- **Meike Van Der Veur**, Marketing & Communications Officer
- **Cristina Muntenu**, Exhibition Coordinator (external)
- **Alliela Inyange**, Event Assistant (temporary)



Photo: Intergraf's Secretariat

FORMER STAFF

- **Alison Grace**, Senior Communications & Policy Officer, *left in March 2023*
- **Despoina Melissinou**, Membership & Events Officer, *left in March 2023*
- **Corinne Durand**, Web & Digital Content Coordinator, *left in March 2023*

→ www.intergraf.eu/about-us/team

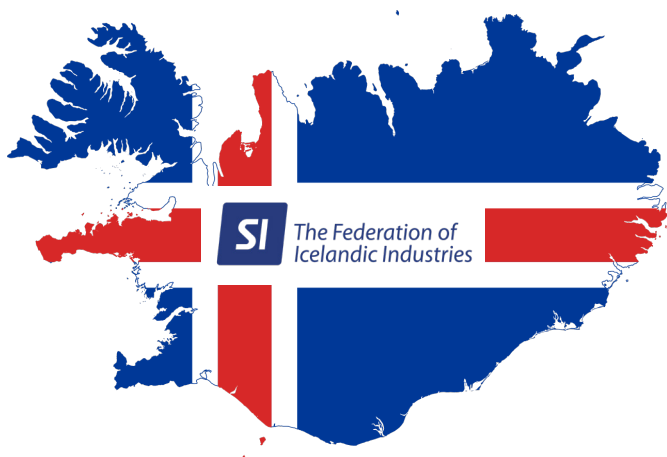
“The Federation of Icelandic industries is pleased to become a member of Intergraf and take part in the effective collaboration that the association is renowned for. As the Icelandic printing industry is relatively small it is vital to have access to information regarding developments, activities, and new services within the European market.”

Lilja Björk Guðmundsdóttir, Former Key Account Manager at SI

PART 3.3

MEMBERSHIP

NEW MEMBERS



Iceland

The **Federation of Icelandic Industries (Samtök Iðnaðarins, SI)** was founded in 1993. It is the largest employers' organisation in Iceland, with nearly 1,400 member companies who are very different in size and field of activity. Among the industries represented are the printing industry, construction, manufacturing, the food industry, power intensive industries, high-tech, and creative industries.

Within the Federation of Icelandic industries, there are eight printing companies which are ambitious in providing high quality products and services with minimum environmental impact.



Romania

Asociația Tipografilor "Transilvania" (A.T.T.) (Transylvania Printers Association) was founded in 2002 and currently has 53 members.

ATT exists to promote the interests of employers in the printing industry. Uniquely structured as an industry association, ATT brings together printers and their suppliers. The association supports members in their economic activities. They also maintain good relations with governmental and non-governmental bodies, as well as promoting the interests of associated commercial companies.

NEW ASSOCIATE MEMBERS

AGFA



Canon



OSD

OESTERREICHISCHE STAATSDRUCKEREI



EVROGRAFIS

A stylized map of Europe in light gray. Red location pins are placed in Iceland, the United Kingdom, France, Germany, Italy, Spain, and Portugal. Blue location pins are placed in the Netherlands, Belgium, Luxembourg, Austria, Switzerland, and Sweden.

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**

Iceland **FEDERATION OF ICELANDIC INDUSTRIES**

Italy **ASSOGRAFICI**

Latvia **LATVIAN PRINTERS ASSOCIATION**

Lithuania **LISPA**

Luxembourg **AMIL**

The Netherlands **KVGO**

Norway **NORSK INDUSTRI**

Portugal **APIGRAF**

Romania **TRANSYLVANIA PRINTERS ASSOCIATION**

Sweden **GRAFISKA FÖRETAGEN**

Switzerland **VISCOM**

Switzerland **VSD**

United Kingdom **BPIF**

ASSOCIATE MEMBERS

Austria **OSD**

Belgium **AGFA**

Belgium **FTA Europe**

Germany **Heidelberg**

Germany **Kurz**

Italy **ACIMGA**

Israel **HP**

Poland **PWPW**

Poland **Quad Europe**

Slovakia **DIW Print**

Slovenia **Evrografis**

Spain **FNMT**

Switzerland **Koenig & Bauer**

UK **Canon**

UK **ICA**

UK **NHS**

UK **C&C**

Would you
like to join
Intergraf?
Get in touch!

→ www.intergraf.eu/members/members

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



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