



INTERGRAF ACTIVITY REPORT

June 2023 - June 2024

EUROPEAN AFFAIRS TEAM

THE EUROPEAN PRINTING INDUSTRY



100.000
PRINTING COMPANIES



95%
FEWER THAN 20 EMPLOYEES



600.000
EMPLOYEES



€80 BILLION
TURNOVER (EU27+UK; CH; NO; IS)



€1.3 BILLION
POSITIVE TRADE BALANCE

FOREWORD

This year, Intergraf dedicated its work to showcasing that the print sector stands at the forefront of sustainable progress, demonstrating a profound commitment to utilizing renewable and recyclable materials while continuously embracing technological advancements. **In an era where sustainability is paramount, our industry shows its capacity to adapt, reinforcing its resilience seizing new opportunities.**

One of the most notable developments of 2023 and 2024 has been the **increased interest in our carbon footprint initiatives**. With the upcoming EU sustainability reporting requirements, the importance of understanding and mitigating our industry's carbon footprint has never been more paramount. We have strengthened our collaborations with publishers and other stakeholders, as well as organised a panel discussion on carbon footprint at drupa, the world's largest print fair that took place in Dusseldorf in late May and early June 2024. These engagements highlight the growing recognition of our pivotal role in driving sustainability within the graphic industry.

With our information we assist our members and their affiliated companies in navigating intricate EU legislation. Our latest major **guidance document** specifically addresses the new EU Regulation on deforestation-free products (EUDR) and helps in its complex implementation.

In today's regulatory and political landscape, which focuses primarily on digital communication, it is more important than ever to emphasize that print consistently delivers essential & impactful products and meets the ever-evolving demands of contemporary society and competitive markets. In 2023 & 2024, **Intergraf has continuously advocated that print needs to be integrated into people's informational diet alongside digital media**, rather than being replaced by it. This balanced approach leverages the strengths of both mediums, enriching the way information is consumed and understood.

With this in mind, in 2024 Intergraf has embarked upon a **comprehensive research review of existing studies comparing print and digital media** and assessing their efficiency, sustainability, and consumer preferences towards each. The insights gained from this exercise are

crucial as we advocate for the value and relevance of print in a digital age, especially in the face of increasing legislation that tends to limit print products in favour of digital alternatives.

Furthermore, to enhance the image of the graphic sector, particularly against the backdrop of the 2024 European elections, **Intergraf and its members developed 10 key messages of the print industry**. Each message is supported by quantifiable, research-based arguments and data. These will be essential to effectively engage with newly elected European legislators, lawmakers on the national level and other stakeholders.

This work is crucial in the face of recent **"digital-first" legislative approaches**. For instance, in 2023, the EU decision-makers proposed pharmaceutical legislation which gives the possibility to EU countries to remove printed medical leaflets from medicinal products and substitute them with a QR code. This trend shows that today, **European legislation lacks protection for consumers who need or prefer offline communication** to stay connected and informed. Without an equal focus on fairness in both online and offline realms, a significant portion of citizens face potential unfair treatment which can exacerbate the social exclusion and digital divide.

Moreover, our network has expanded with the addition of **new associate members**, enriching our community and enhancing our collaborative efforts. In the field of security printing, we achieved a milestone with one of the most successful Intergraf Currency+Identity events in our history, attracting 940 participants and over 100 exhibitors. This success reflects our ongoing commitment to excellence and innovation in security printing.

Certification activities have also been a focal point, with both online and in-person workshops planned to support our members in maintaining high standards and adapting to new industry requirements.

As we look ahead, we remain steadfast in our mission to support the graphic industry through advocacy and collaboration. The achievements of this past year inspire confidence in our ability to navigate the challenges and opportunities that lie ahead.



Ulrich Stetter
President



Beatrice Klose
Secretary General

2023-24

IN NUMBERS



4

CONFERENCES ORGANISED

GENERAL ASSEMBLY
PRINT MATTERS FOR THE FUTURE
DIRECTORS' CONFERENCE
CURRENCY +IDENTITY CONFERENCE



22

FULL MEMBERS



14

ASSOCIATE MEMBERS

+2 IN 2023/2024



21

EXTERNAL PRESENTATIONS GIVEN



11

WORKING GROUP MEETINGS



1,055

EVENT PARTICIPANTS

+70 FOR C+I
+30 FOR PRINT MATTERS



570+

NEWSLETTER SUBSCRIBERS



5,500+

SOCIAL MEDIA FOLLOWERS

2815 INTERGRAF LINKEDIN
2346 C+I LINKEDIN
344 TWITTER
AS OF MAY 2024



5

BOARD MEETINGS



5

STEERING COMMITTEE MEETINGS



14

PRESS RELEASES



130+

MEETINGS ATTENDED



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**PART 1:
KEY TOPICS**



With the increasing demand from customers, the work of Intergraf on carbon footprint is crucial for our companies. Intergraf provides a harmonised approach and a credible way to calculate the carbon footprint of our products that ultimately will support a level playing field in the way the industry communicates to customers and report on this matter.



Jesper Jungersen, Vice-President, Intergraf

CO₂

PART 1.1 SUSTAINABILITY

SUSTAINABILITY.

Sustainability is a pressing concern in 2023 & 2024 and will remain so in years to come. Through its advocacy and several sustainability projects, Intergraf aims to enhance the sector's environmental credentials and combat false and misleading statements about the environmental footprint of our products.

CARBON FOOTPRINT IN THE PRINTING INDUSTRY

While the initial Intergraf Recommendations on CO₂ emissions calculation in the printing industry were adopted in 2013, they have become increasingly popular in the last few years and have generated an increased interest, along with the related **Intergraf Roadmap to CO₂ calculation, reduction and compensation in the printing industry**.

Notably, Intergraf is in discussion with several publisher associations – international and European – to aim at harmonising our approach to carbon footprint. Published in 2023, the **Publishing 2030 Accelerator** – CO₂e emissions calculation for printed books – the International Publishers Association (IPA) recognises the Intergraf approach as the approach to use for the assessment of the printing part of the carbon footprint of the publication of a printed book.

Beginning of 2024, the **World Print and Communication Forum (WPCF)** also affirmed their commitment to reducing the carbon footprint of the graphic industry. WPCF underscores the necessity for a common understanding and internationally recognised assessment criteria to ensure transparency and consistency in reporting emissions, as well as considering the 3 scopes of the Greenhouse Gas Protocol in line with the approach promoted by Intergraf.

The Intergraf approach also generated the interest of **drupa**. Intergraf Secretary General, Beatrice Klose, host a panel discussion on the opening day at the **drupa cube** showcasing how a printer

and a publisher share the same understanding on the calculation of their carbon footprint using the Intergraf Recommendations through the related calculation tools – **ClimateCalc** and **KlimaInitiative** – and the Intergraf Roadmap to reduce their emissions.



Climate Initiative
of the German
Printing and Media
Industries Federation



ASSESSMENT OF ENVIRONMENTAL SCHEMES IN THE PRINTING INDUSTRY

Taking a further step in improving the environmental credentials of the European printing industry, Intergraf published its new **Method for the Assessment of Environmental Schemes for printed products (MAES)** in 2024. This initiative comes at a perfect time in the context of the proposed Directive on substantiating green claims, which includes provisions on labeling schemes. There are many ecolabels and other environmental certification schemes available in the market for printed products, each with different scopes and purposes. MAES can help printers, as well as print buyers, navigate among these schemes, select the most relevant, and communicate more effectively about their actual meaning. MAES must be handled by informed users, as it requires them to weigh the different parameters according to the requirements of the assessed environmental scheme.

One of the key elements of MAES is the **eight environmental parameters** identified by Intergraf to assess the environmental performance of printed products following a life-cycle approach.



The EUDR generates many questions from the industry, including from printers around the globe. These questions are fair, as the compliance exercise will be extremely challenging for the entire paper and print value chain due to the complexity of paper and board-based products. These products involve the mixing of fibres from hundreds of thousands of different plots of land, thereby generating hundreds of thousands of geolocation data points. Intergraf aims to support the industry by providing guidance and advocating for a pragmatic implementation of the requirements.



Laetitia Reynaud, Senior Policy & Economic Advisor Intergraf

PART 1.2 DEFORESTATION

DEFORESTATION.

SUPPORTING PRINTERS IN THEIR COMPLIANCE WORK WITH EUDR

The **EU Regulation on deforestation-free products (EUDR)** was published in May 2023. It bans the placement of products on the EU market from supply chains associated with deforestation or forest degradation. To this end, the EUDR imposes due diligence obligations and restricts market access for several commodities and products if they are not deforestation-free. The EUDR includes within its scope wood-based products, including paper and board, as well as printed products. All EU printers, as well as non-EU printers delivering to the EU market, are impacted by the legislation.

Intergraf has been actively working on the topic to clarify the impact of the Regulation on the printing industry. During 2023 and 2024, Intergraf sent a number of requests for clarification both individually and jointly with other stakeholders, not only to clarify key concepts but also to call for a pragmatic implementation of the requirements. Intergraf also joined several cross-sectoral initiatives to promptly provide the adequate tools to allow companies to prepare for compliance and to support the call for a longer transition time before the entry into application of the obligations.

In January 2024, Intergraf published a guidance document highlighting the scope, timeline, and key requirements. It includes decision trees and checklists to help printers identify their specific obligations under EUDR. For the launch of the guidance document, **Intergraf organised a webinar for its members where both Intergraf and the paper manufacturers' organisation CEPI provided a detailed overview of the legislation.**



31 DECEMBER 2020 Cut-off date for deforestation	30 DECEMBER 2024 EUDR provisions applicable; EUTR no longer applicable for timber products produced before 29 June 2023	31 DECEMBER 2027 EUTR no longer applicable
	29 JUNE 2023 EUDR entering into force	30 JUNE 2025 EUDR provisions for SMEs applicable



The Intergraf Messaging Guide serves as a cornerstone within the broader framework of Intergraf and its members' communications, crafted in a collaborative effort of the association's team and its Steering Committee. This document has been designed to aid in better and more efficiently conveying the role of the print sector in society and its indispensability & vast contribution to all industry sectors, as well as to art, education, public security, and thus to underline the indispensable role of print in shaping society's fabric.



Monica Scorzino, Chair of the Steering Committee

PART 1.3 PROMOTING PRINT

PROMOTING PRINT.

Print's indispensability to today's world and its significant contributions to the society and economy often go unnoticed. Intergraf is dedicated to communicating the vital role of print in education, democracy, inclusivity, information transmission and storage, and other important aspects of society.

PRINT AND DIGITAL

In 2024, Intergraf executed a project titled **Comparing print and Digital media: Research review on sustainability, efficiency and perceptions of print and digital communication tools**, aimed at providing an overview of studies comparing print and digital communication tools in terms of sustainability, efficiency, and consumer preferences.

More than 80 studies were included in the document. A variety of themes are covered: sustainability, reading comprehension and behaviour, marketing and communications, accessibility, and the digital divide.

The outcomes of the project point out that there should be greater emphasis on the complementarity of print and digital communication tools, rather than their substitution. Communication is a multifaceted notion, and printed products possess unique properties that often cannot be digitally replicated.

Conducted from January to May, the research review resulted in the creation of a comprehensive database which summarizes the studies' findings, methodologies, and limitations. A report summarizing the key themes, arguments, and trends identified in the desk research was also drafted and is available to Intergraf members.

10 MESSAGES OF THE PRINT INDUSTRY

To enhance the image of the graphic sector, particularly against the backdrop of the 2024 European elections, **Intergraf and its members developed 10 key messages of the print industry.**

These messages are curated to resonate with diverse audiences; they are to serve as a basis for Intergraf messaging in the pre and post elections month. Intergraf produced a detailed **Messaging Guide** to serve as a cornerstone within the broader framework of the Intergraf's communications.

This document has been designed to aid Intergraf and its members in better and more efficiently conveying the role of the print sector in society and its indispensability and vast contribution to all industry sectors, as well as to art, education, public security, and more. Each message is fortified with proof points and references, empowering users to effectively communicate the indispensable role of print in shaping society's fabric. The dissemination of these messages, will help to cultivate a deeper understanding of the enduring significance of print.

YOUNG TALENT AWARD 2024

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. This endeavour by Intergraf serves as a proactive measure to foster the growth and development of young professionals in print, encouraging their participation and contribution.

This year's focus was Artificial intelligence, which is among the top priorities on the EU agenda. Candidates were invited to respond to the following question: **How might AI affect the print industry, and what are the associated risks and opportunities?**

The **winning first place** was awarded to **Pien Haks** from the Netherlands, **Marcus Rasmussen** from Denmark won **second place**, and **Constança Barbosa Simões** from Portugal won **third place**.





MLPS appreciate the partnership with our member Intergraf. Their European geographical coverage coupled with their competence in advocating for the graphic industry, offer a highly valued resource with the MLPS focus to promote & defend pharma paper information leaflets.

Mike Turner Managing Director, ECMA, on behalf of MLPS



PART 1.4 MEDICAL LEAFLETS

MEDICAL LEAFLETS.

In April 2023, the European Commission presented a proposal to review the European pharmaceutical legislation. This is a broad reform, including a revision of the Directive on medicinal products for human use.

In its proposal, 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.

ADVOCACY FOR PRINTED LEAFLETS

Intergraf partnered with MLPS (Medical Leaflets = Patients Safety), regrouping healthcare packaging producers, to advocate for maintaining paper leaflets.

When approaching members of the European Parliament, Intergraf highlighted the potential impacts of relying solely on electronic leaflets, especially for the substantial population of Europeans lacking internet access, smartphones, or digital literacy. Such a shift could leave millions of vulnerable individuals without guaranteed access to crucial medical information, increasing the risk of medication mis-dosage. The arguments also address the lack of clarity on implementing patients' "right to a printed copy of leaflets," presented as an alternative to paper leaflets. While this concept appears promising in theory, there is no clarity on how it will be implemented in practice. The printing of pharmaceutical leaflets is an industrial process monitored by strict operating and security procedures. It cannot be replaced by a print-on-demand system in pharmacies.

LEGISLATIVE PROGRESS

In August 2023, Intergraf and Grakom approached Danish MEP Pernille Weiss, Rapporteur on the file, and organized a site visit to Stibo Complete to demonstrate that medical leaflets are produced by trained workers under very strict technical and safety specifications, showing that printing on demand by pharmacists is not a reasonable option.

Prior to the European elections, the European Parliament adopted its position, maintaining in broad lines the approach of the European Commission. Advocacy efforts ensured that a broad stakeholder consultation needs to be organised by Member States before an implementation of a digital solution for medical leaflets is possible. Furthermore, the European Parliament ensured that Member States remain in control and removed the possibility for the European Commission to implement a digital solution by delegated act. The European Council will now have to adopt its position.

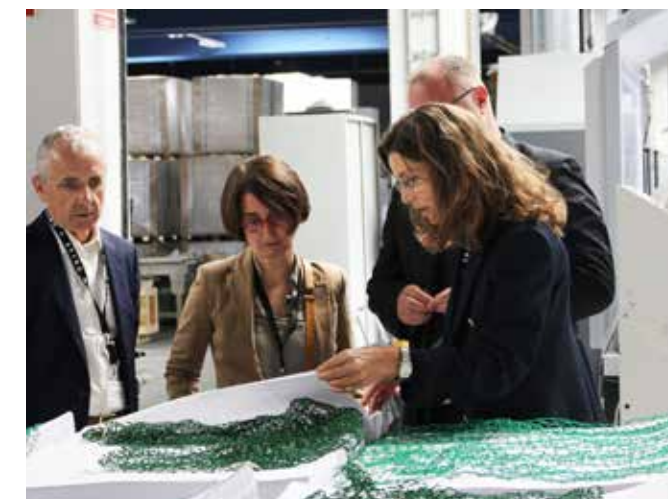


Photo: Intergraf organized a meeting with MEP Pernille Weiss, the European Parliament's Rapporteur on the review of pharmaceutical legislation, on August 25, 2023. The meeting, hosted by STIBO Complete in Denmark, included participants Søren Henriksen and Frank Sørensen (Stibo Complete), Carsten Bøg (Grakom), Laetitia Reynaud (Intergraf), and Mike Turner (MLPS).



Packaging printing has become an important area of work for Intergraf. We aim at keeping members informed about their obligations under the new Packaging and Packaging Waste Regulation and at securing that the future rules on food contact material are workable for the printing industry.



Laetitia Reynaud, Senior Policy & Economic Advisor, Intergraf

PART 1.3 PACKAGING

PACKAGING.

Packaging remains an area of high attention for the Commission. The packaging sector is pivotal to the resilience of the EU economy, as a strategic autonomy asset and as a key element to guarantee the security of products supply. It plays a central role in the EU economy.

NEW RULES TO GOVERN PACKAGING AND PACKAGING WASTE

At the end of 2022, the European Commission published the proposed **Revision of the Packaging and Packaging Waste Directive** to reinforce the essential requirements for packaging and establish EU-level packaging waste prevention measures and targets. The new rules take the form of a Regulation which was finalised in April 2024.

Intergraf has closely monitored the aspects that could impact the printing industry. In particular, we advocated for and secured that printing inks and related materials, such as varnishes and coatings that are essential for the production of the final printed packaging, to be excluded from the scope of the recycling target or minimum recycled content target.

On more general aspects, Intergraf joined forces with other packaging trade associations, led by EUROOPEN, to secure a workable regulatory framework for all actors in the packaging value chain.

The new requirements will be applicable by the end of 2025. The updated rules include provisions for the minimization of packaging. An empty space ratio of 50% will be applicable to grouped packaging, transport packaging, and e-commerce packaging. Certain single-use plastic-based packaging formats will be restricted. The text also includes requirements for economic operators to use transport and e-commerce packaging in a reusable format. Throughout the process, the proposal was amended in favor of fiber-based packaging, with the restriction on single-use packaging for food and beverages consumed in HORECA premises now limited to plastic packaging, and exemptions granted to cardboard boxes from reuse requirements.

MINERAL OIL IN PRINTING INKS

In 2023 and 2024, Intergraf has been monitoring the legislation regulating mineral oil in printed materials, both packaging and publications. Intergraf's French member UNIIC challenged the legislation that limits the use of mineral oil content in printing inks before the Council of State. In its current state, the rules are not compatible with the industrial and technical reality of the sector. While the thresholds, in particular those applicable as of 2025, seem unworkable for certain processes, the key elements are the lack of a precise definition of mineral oil and the lack of analytical methodology in the legislation. Intergraf is supporting the activities of its French member with the aim to clarify how printers delivering the French market can be compliant with the rules.

PRINTED FOOD CONTACT MATERIALS

While the European Commission was due to present a revision of the regulatory framework on food contact, it finally kicked off its work early 2024. The official proposal reviewing the Food Contact Material legislation is not expected to be presented before 2025-2026. The Commission intends to produce first working papers and organise working group meetings of experts, which will serve as basis for the Impact Assessment and the formal proposal. The Commission confirms its intention to prioritise a risk assessment approach, to increase responsibility along the supply chain and focus the requirements on the final material and article. Intergraf will have the opportunity to provide input to the consultation process to ensure printing aspects are taken into consideration in the future food contact legislation.



**PART 2:
OUR WORK**

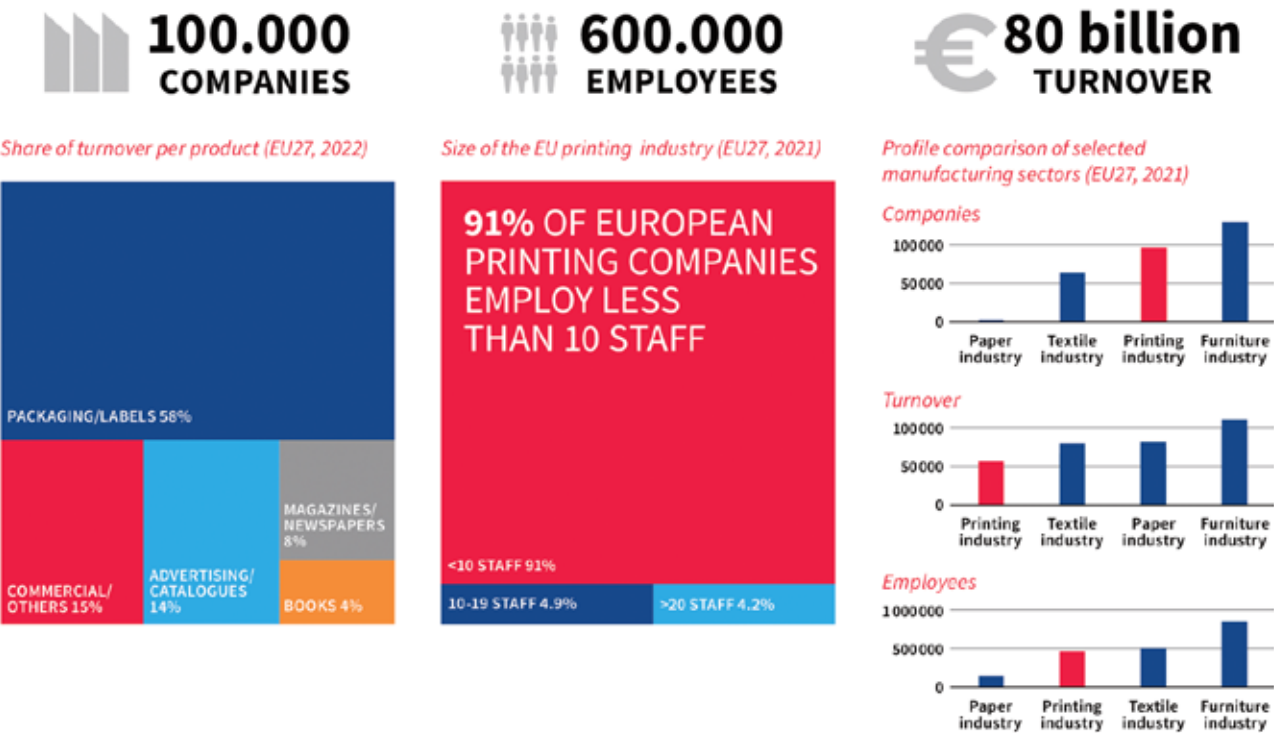
2.1 ECONOMIC INFORMATION

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.

Profile of the European printing industry



Source: Eurostat 2024, processed by Intergraf, data for EU27+UK+NO+CH+IS except when specified differently.



To learn more about the Economic report or receive a copy, get in touch with Laetitia Reynaud at lreynaud@intergraf.eu.

2.2 COMMUNICATIONS & TOOLS

Intergraf’s mission is to **promote and protect** the printing industry at European level. We communicate our messages via a growing array of channels. We also produce policy tools to help our members to address the most important issues.

NEWSLETTERS

- Newsflash
- News in Brief
- Economic News
- Regulatory News

REPORTS & TOOLS

- Activity Report
- Economic Report
- Intergraf Messaging Guide

POLICY COMMS

- EU Policy Webinars
- Position Papers
- Joint Statements
- EU Policy Guides & Factsheets

SOCIAL MEDIA

- LinkedIn Intergraf
- LinkedIn Intergraf C + I
- X (formerly known as Twitter)

PRESS

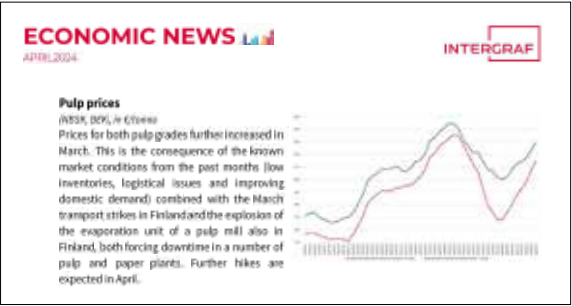
- Press Releases
- Interviews
- Commentary

WEBSITES

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



Intergraf brochure



Economic News, April 2024



Intergraf's website, home page



Press release, March 2024

2.3 CAMPAIGNS



INTERGRAF CAMPAIGN 2024

Intergraf's new communications campaign aims to bolster the image of the graphic sector, especially in light of the 2024 European elections. Being developed in collaboration with Intergraf members, the campaign features **10 key messages of the print industry supported by quantifiable research and data**. These messages are strategically crafted to effectively engage with newly elected European legislators, national lawmakers, and other stakeholders. By providing evidence-based arguments, Intergraf endeavors to underscore the significant contributions of the print industry, fostering informed decision-making and robust partnerships.



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.



MLPS

Intergraf joined MLPS (Medical Leaflets = Patient Safety) to work on the proposed amendment on medical leaflets to the pharmaceutical legislation. MLPS advocates for printed pharmaceutical leaflets to remain the primary source of information for patients and healthcare professionals to guarantee a safe and accurate delivery of medication information. MLPS was formed in 2020 by a collective of regulated healthcare packaging makers with the European Carton Manufacturers Association (ECMA).



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.



THE FUTURE OF READING

Extensive research highlights the advantages of reading on paper over screens, showing benefits in comprehension, concentration, retention, deep reading, and mental health. While the digital transition offers opportunities, it also poses threats, particularly to reading and literacy. The PISA 2022 results show a significant decline in reading performance among students in OECD countries, with a 10-point drop, equivalent to half a year of learning. Additionally, 26% of these students are now low performers in reading, raising concerns about literacy and future academic success.

Intergraf and its members advocate for a **reconsideration of digital-heavy educational policy. Educational approaches in favor of print materials improve learning outcomes, literacy and reading skills**. Research findings are shared with EU and national policymakers.

“ Our Research consistently shows that reading printed books leads to better comprehension than digital reading, something The Association of Swedish Graphic Industry has long worked to emphasize. Therefore, I am very pleased that the Swedish government as of July 1, 2024, will implement an amendment to the Education Act, requiring that Swedish students have access to physical textbooks. Additionally, the government is increasing funding for both books and staff in school libraries.

Eva Glückman, Managing Director of Grafiska Företagen

2.4 EVENTS

Intergraf hosts a portfolio of events, which have evolved into significant fixtures within printing industry stakeholders’ calendars. These events serve as platforms for discussing pertinent industry issues and fostering invaluable connections.

This cycle, the Intergraf EU Advocacy Team organised events in Latvia, Iceland, Romania, Germany and online. In June 2023, Intergraf members met in Riga for the General Assembly and Print Matters 2023 Conference. In September, Directors of Intergraf member associations met in Reykjavík for the Directors’ Conference.

In 2024, Intergraf organised a panel discussion and a presentation on sustainability in the print industry, they took place at the drupa trade fair in Düsseldorf, Germany. Additionally, the EU Advocacy Team hosted the Print Matters conference 2024 in Bucharest and a webinar titled *Navigating the EU Deforestation Regulation: Insights and Guidance for Printing Companies*.



Photos: Print Matters conference, Riga, June 2023



Photo: Intergraf Directors’ Conference, Reykjavik, September 2023

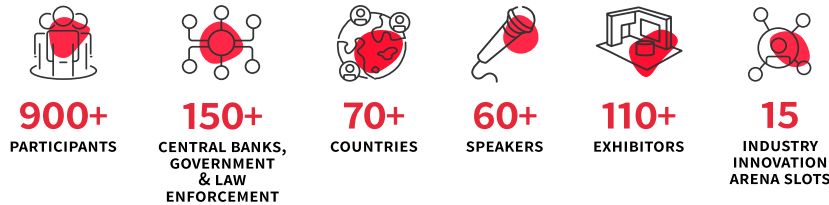


Photo: Intergraf General Assembly, Riga, June 2023

2.5 INTERGRAF CURRENCY+IDENTITY

Every 18 months, Intergraf organises Intergraf Currency+Identity, a neutral conference and exhibition that aims to foster the development of the industry by cultivating visionary perspectives, enhancing skills, and shaping progressive mindsets. It is a unique, non-profit platform that brings together central banks, governments, identity document issuing authorities, security suppliers and industry-specific digital solution providers in one place.

In 2023, Intergraf Currency+Identity took place from 18 to 20 October in Bilbao: 940+ participants came together as a close-knit community for a 3-day experience filled with learning and networking opportunities, inspirational keynotes, and technical insights providing interactive discussions on the current challenges faced by the industry, as well as innovative ideas for the future.



The Bilbao stage hosted parallel sessions on currency and identity featuring presentations from central banks, governments, and law enforcement providing a dynamic exploration of innovation in currency and identity and encouraging engaging conversations. The exhibition floor offered first-hand access to cutting-edge solutions and products from 100+ world class security suppliers. Some exhibitors seized the opportunity of having so many industry players under one roof to launch new products and a few new partnerships were announced too. Two exclusive parallel events took place the day before, on 17 October 2023: Intergraf Identity High and Intergraf Currency High. Attendance is by invitation only and restricted to a select vetted audience to ensure high-profile conversations and the exchange of best practices within a secure environment.

Special attention also went to the benefits of Intergraf certification during the Certification Workshop “Let’s talk about certification - A strategic approach to everyday problem solving for Intergraf-certified companies” and, new that year, the Tender Tactics session during which interested parties could learn about INTERGRAF ISO 14298 and INTERGRAF 15374: internationally acknowledged standards meticulously designed to cater to unique identity and currency needs.

The event offered various networking opportunities, including exclusive access to the Guggenheim Museum, an exhibition meet & greet, and an event at San Mamés stadium.

The next Intergraf Currency+Identity will take place 5-7 March 2025 in Milan.

www.intergrafconference.com



Photos: Intergraf Currency+Identity, Bilbao, October 2023

2.6 INTERGRAF CERTIFICATION



ISO 14298 INTERGRAF 15374

www.intergrafconference.com/intergraf-certification

In the dynamic and highly competitive field of security printing, Intergraf stands as a pivotal entity in setting standards that safeguard the interests of the industry. Our certifications Intergraf ISO 14298 and Intergraf 15374, are crucial for security printers, hologram manufacturers, and their suppliers. These certifications provide a robust framework for managing security printing processes, helping solution providers and institutional end users address the challenges posed by a competitive market.

Intergraf ISO 14298 and Intergraf 15374 certifications encompass a comprehensive approach to security, covering logical security, physical security, and supply chain assurance. By adhering to these stringent requirements, certified companies significantly reduce risks associated with their operations and products, ensuring a high level of security across all processes.

Currently, more than 175 production sites in over 50 countries across six continents benefit from Intergraf's certifications. The audits are conducted by two independent certification bodies, VPGI (NL) and SQS (CH), ensuring impartiality and global reach.

In addition to the certifications, Intergraf hosts regular Certification Workshops, both online and in person. These workshops provide a platform for certified companies and end customers, including governments, central banks, and tendering authorities, to stay informed about current issues and share insights within the community.

The next workshop is scheduled to be held in Milan on March 4, 2025.

2.7 EUROPEAN SOCIAL DIALOGUE

www.intergraf.eu/policy/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 joint communications include:

- **Social Partners emphasise key priorities for Packaging and Packaging Waste Regulation.**
- **'Digital by default' or 'digital only' approaches in European legislation are not neutral** (together with Cepi, FEPE & IndustryALL).

AMAZON STUDY

Intergraf and UNI Europa Graphical commissioned Syndex to conduct a study titled **Amazon and the packaging, publishing and printing industries**. The paper examines the impact of Amazon on the packaging, publishing, and printing sectors. It looks into how Amazon's pricing strategies, wide selection, and fast delivery times have influenced the retail landscape, including changes in the number of traditional book retail stores. The study also explores Amazon's role in the e-book market, and its involvement in the self-published printed books market and its varying influence in the European market due to regulatory differences.

This study is exclusive to the members of both organisations.

2.8 PARTNERSHIPS

UNI EUROPA GRAPHICAL

As the **European Social Partner** representing workers in the graphical sector, **UNI Europa Graphical** is Intergraf's counterpart in the sectoral **Social Dialogue**. 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 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 | www.printyourfuture.eu

FTA EUROPE

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

The key activity of FTA Europe is the **Diamond Awards**, which recognises exceptional flexo printers from across Europe and beyond every year. Diamond Award entries are already winners in national flexo awards of FTA Europe member countries, establishing them as the pinnacle of flexographic excellence.

The most recent **FTA Europe Diamond Awards** took place in Düsseldorf, Germany on Thursday 30 May 2024, amid drupa trade fair and was a success with more than 340 attendees and 16 award categories.

www.fta-europe.eu

EPRC

Intergraf is a member of the European Paper Recycling Council (EPRC). The EPRC was set up as an industry self-initiative in 2000 to **monitor progress towards meeting higher paper recycling targets**. These are set out in the European Declaration on Paper Recycling first published in 2000 and renewed every five years since. The current target for the 2021-2030 European Declaration is set to 76%.

www.paperforrecycling.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**, for which Smithers provides a detailed presentation at the event and a market report. Past topics have included commercial print, packaging, magazines, direct mail, and books.

www.smithers.com



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**.

In September 2023, WPCF members convened in person for the first time since 2020 in Bangkok. During this gathering, they engaged in discussions addressing the challenges confronting the global print and packaging industry, exchanged invaluable insights, and strengthened global collaborative efforts. Following this meeting, the **WPCF 2023 Economic Report** was published, presenting key data about the global economy, print markets and focused country reports about WPCF members. Members also signed a declaration on best practices in carbon footprint calculation in accordance with the Intergraf recommendations in the field.

The most recent WPCF meeting took place in at drupa in Düsseldorf, Germany.

www.worldprintforum.org



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

PACKAGING CHAIN FORM

managed by  **europen**
SHAPING A SUSTAINABLE
FUTURE FOR PACKAGING

PACKAGING INK JOINT INDUSTRY TASK FORCE (PIJITF)

XSG (CROSS SECTOR GROUP) ON FOOD CONTACT MATERIALS



Industry4Europe Coalition



European Solvents Downstream Users
Coordination Group (ESVOC)



European Platform for Chemicals-Using
Manufacturing Industries (CheMI)



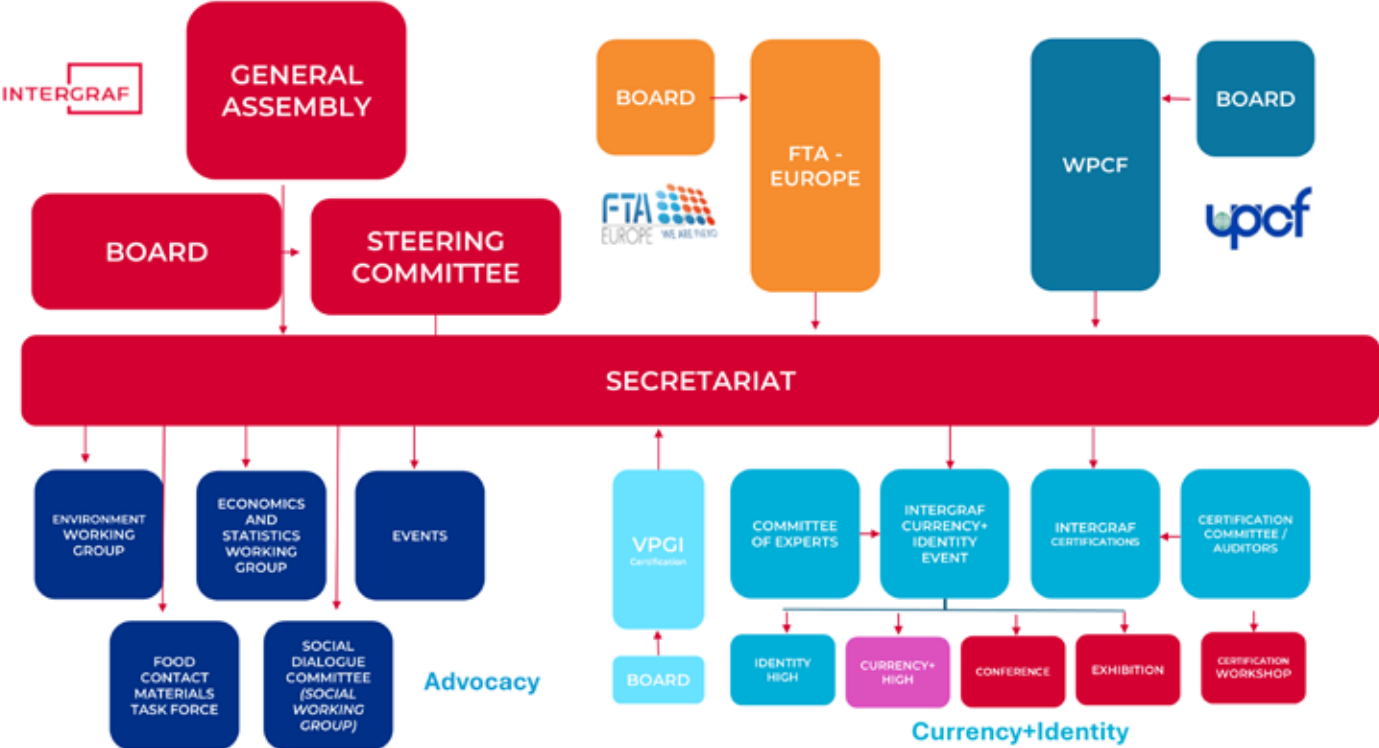
BusinessEurope (e.g. European Employers
Network)



**PART 3:
GOVERNANCE**

Photo: Intergraf Steering Committee at Print Matters in Riga, 2023

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, 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 Directors or other high-level representatives from national printing associations. Countries currently represented are **Denmark, Germany, Italy, the Netherlands, Portugal, Sweden, Switzerland, 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 & Economic Advisor



Sergejs Mikaeljans.
Communications & Events Officer

ADMIN, ACCOUNTING, WEB&DESIGN



Reka Sipos.
Admin and Certification Assistant



Sanaâ d'Hennezel.
Expert-Accountant



Elsa Lopez.
Web & Digital Officer

SECURITY PRINTING



Doris Schultz-Pätzold.
Customer Relations and Certification Director



Simona Barbulescu.
Event Manager



Meike van der Veur.
Marketing & Communications Officer



Cristina Munteanu.
Exhibition Coordinator



Alliel Inyange.
Event Assistant

TEMPORARY STAFF



Jeremy Tawedian.
Research Assistant

www.intergraf.eu/about-us/team



“Intergraf and Canon collaborate extensively to help support and promote the graphic arts industry across Europe. We have worked together on many projects in recent years, including a Canon podcast episode, which focused on the Future of Print in the EU – and live events such as Canon’s ‘Make It’ event in Munich, for leading customers and prospects, and Intergraf’s Print Matters Conference in Riga in June 2023. We would like to thank the Intergraf team, recognising their significance to the print industry and Canon, and look forward to further building on our relationship in 2024.”



Jennifer Kolloczek, European Planning, Marketing & Innovation
Senior Director, Production Print at Canon Europe

PART 3.3 MEMBERSHIP

NEW ASSOCIATE MEMBERS.



Landa Digital Printing was founded by Benny Landa with the purpose of addressing the limitations associated with traditional digital and conventional analog printing methods. Its Nanography® technology enables Landa Nanographic Printing® Presses to create high-quality images with a wide color range, suitable for printing on various media types, with flexible print run lengths, and efficient turnaround times.



Sappi is a global leader in woodfibre-based renewable materials, focusing on sustainable processes and products. It manufactures dissolving pulp, wood pulp, biomaterials, packaging papers, specialty papers, graphic papers, and forestry products from sustainably managed forests. Many facilities use bioenergy, making operations largely self-sufficient. Annually, Sappi produces 5.5 million tons of paper, 2.6 million tons of paper pulp, and 1.5 million tons of dissolving pulp.

ASSOCIATE MEMBERS



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 **ECO3**

Belgium **Sappi**

Germany **Heidelberg**

Germany **Kurz**

Italy **ACIMGA**

Israel **HP**

Israel **Landa Digital Printing**

Poland **PWPW**

Slovenia **Evrografis**

Spain **FNMT**

Switzerland **Koenig & Bauer**

UK **Canon**

UK **ICA**



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



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