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INTERGRAF
European Federation for Print and Digital Communication

Newsflash



64% made online purchase after receiving printed advertising mail

In their Advertising and E-Commerce Survey, the International Post Corporation (IPC) and Global Envelope Alliance (GEA) present figures about consumer preferences for advertising - digital and other - when online shopping.

In a comprehensive survey about consumer preferences in advertising and online shopping, the IPC and GEA targeted online shoppers in Germany, Japan and the USA who have purchased physical goods online at least once in the last three months and receive printed advertising in their letterbox at least once per month. The research makes clear that this cohort of people are very receptive to printed advertising.

The survey asked how many online purchases respondents had made as a result of receiving advertising mail in the past year: "While 36% had made no purchases, 23% made 1 or 2 online purchases, 14% bought 3-4 items, 11% bought 5-6 items, 7% bought 7-10 items, and 9% bought more than 10 items online as a result of advertising mail. This gives an average of 4.4 purchases per year per consumer." In Germany, however, the amount was slightly lower at 3.7

purchases per year per consumer.

How their online purchases are packaged was also important to respondents, with 66% overall (75% in Germany) identifying a preference for cardboard packaging (followed by large-format envelopes) due to sustainability concerns. 58% (68% in Germany) said they were prepared to pay an additional 10c for sustainable packaging. A plastic wrapper is the least preferred form of packaging for e-commerce, while paper is the most popular choice.

You can find out more about the packaging market across Europe at Intergraf's upcoming Packaging Conference on 21 February. Places are still available but are limited so register today to avoid disappointment! <https://www.intergraf.eu/events/shaping-the-future-of-print/packaging-conference-2019-brussels>



Edited by Alison Grace.
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Intergraf to coordinate COSME project on recruitment



Intergraf has today received the good news that our project proposal under the COSME programme was successful.

Earlier this year, Intergraf applied to the open call for tender: *Blueprint for Sectoral Cooperation on Skills: Towards an EU strategy addressing the skills and recruitment needs of the paper-based value chain (pulp & paper manufacturing and paper-based printing)*. We applied alongside CEPI, the European paper industry federation and a consortium of national partners from Austria, Belgium, Germany, Italy, Slovenia and The Netherlands. Experts from additional countries will also be involved in order to add value to the project.

The project's central focus is future skills and training needs. To address these needs, the primary output of the project will be the development of a sectoral recruitment strategy and toolkit, as well as other relevant supporting materials.

The tender contract is due to be signed by the end of 2018, but final dates for kick-off meetings, etc., have not yet been agreed. More information about this project and Intergraf's involvement in it will follow shortly.

For more information about this news: agrace@intergraf.eu

“This project offers a timely opportunity to the European printing industry. Image and recruitment campaigns remain some of the most critical actions we can take to improve the future of the sector and I am pleased that Intergraf can contribute to such improvements with this project.”

**Beatrice Klose,
Secretary General
of Intergraf**

“A short review period for the authorisation of chromium trioxide will force the industry to first start the process shortly after the Decision and second consider an industry-specific application, covering publication, packaging and décor gravure printing.”

**Laetitia Reynaud,
Policy Advisor at
Intergraf**

Gravure printing industry awaits decision on chromium trioxide

Chromium trioxide is a chemical substance that is carcinogenic and mutagenic and has therefore been classified by the European Chemical Agency as a substance of very high concern. It is listed in the list of substances requiring authorisation. The authorisation procedure implies that industrial uses requiring chromium trioxide have to be authorised under the European chemical policy REACH.

Gravure printing requires the production of gravure printing cylinder that are produced in a galvanic process using chromium trioxide to generate the required hard chrome layer. To date, no technically realistic alternative to chromium trioxide is available for the gravure printing industry.

The application has been submitted by importers of chromium trioxide on the European market. An authorisation for continuous use in gravure printing has been submitted along requests for many different industrial uses. Although the technical analysis of the application concluded that authorisation could be granted for 7 years, the political

discussions between the European Commission and Member States may lead to a stricter review period. Other industrial uses in this common application may not prove to be as safe as the use of chromium trioxide in gravure printing. Moreover some Member States are not convinced that no alternative exist for some applications.

In this political discussion, Intergraf has voiced the concerns of the gravure printing industry and called upon the European Commission and Member States to maintain a 7-year authorisation, as recommended by the European Chemical Agency. Chromium trioxide is currently used in gravure printing under strict and controlled conditions. The levels of occupational exposure reached by the gravure printing industry is significantly lower than the threshold set by European legislation.

The dossier will further be discussed in December and a vote may take place in February 2019. Intergraf is following this process and will let you know of any updates in due course.

For more information about this news: lreynaud@intergraf.eu

National situations of printing industry presented in Social Dialogue

At the recent Social Dialogue Working Group, participants gave an overview of the economic situation of the printing industry in their countries. The ensuing discussion was comprehensive and enlightening.



Participants from Portugal, Italy, France, Belgium, the Netherlands, Finland, Germany, Spain, Sweden and Croatia presented the economic situation in their countries at the last Working Group meeting of the Graphical Sector's Social Dialogue Committee. It was made clear that the industry in many countries experiences similar challenges. For instance, the packaging sector is either stable or experiencing an upward trend in most countries. The book market in certain countries - such as France - is also relatively stable, with an value increase of 1% during the last year. Conversely, the graphical printing sector (for the most part) continues to decline.

The printing industry in Europe is made up primarily of SMEs, although the face of the industry is changing. In Belgium and Finland, for example, one key trend is company mergers, resulting in fewer and larger companies. In Finland, the number of printing companies has reduced from 900+ to approximately 720 in recent years. The sector is consolidating, with some companies closing and others merging.

Another common trend for printers across Europe is the increasing cost of materials. Paper prices, for instance, have risen throughout 2018.

The resulting higher production costs are causing problems for some printing companies, who are simultaneously being asked by many publishers to reduce their prices. In some cases, this is causing printers to reach their investment limits. There has also been further increases in costs due to rising energy charges in certain countries. In Portugal, for example, during 2018 there has been an energy hike of approximately 17%, with some printers feeling an increase of closer to 30%. The prices for newsprint, ink, aluminium (printing plates) and isopropanol have also lately increased.

A further area of concern for many countries is the legislative direction of regulations concerning direct mail. In Europe as a whole, direct advertising is viewed much more than electronic advertising. Most digital ads are not viewed at all, and direct mail campaigns frequently have more success driving traffic online to buy products than digital mail. However, legislation at national and local levels in many countries - such as the Netherlands and Belgium - is changing to an 'opt-in' rather than an 'opt-out' approach. An opt-in system will prevent many retailers from using direct mail as an advertising tool to contact their customers without their explicit consent. Direct mail printers would

be affected by any drop in volumes as a result of this.

Another issue raised was the decreasing use of printed books in schools. In France, for example, almost no schoolbooks are printed. Everything is now digital. And in Croatia, the government has proposed to reduce the number of books used in schools by 30%. This is a concerning trend for printers and society alike. Printers of course risk losing business, but this situation also risks other societal problems. Screen addiction amongst younger people, for instance, is a growing area of concern. The costs of going all digital in schools is also problematic for many families, who are frequently expected to bear the cost of digital devices. For families with lower incomes, this is a real problem.

The printing industry across Europe also has similar needs with regard to recruitment. Image campaigns are important to promote the sector and to show students, and others interested in the industry, the truth about it. Misconceptions about print and paper abound and the new, modern face of the industry needs to be promoted. Digital advancements also make regular upskilling for existing staff very important. Mentorship could also play a more important role in the future.

“Negotiations on graphic paper prices for 2019 have started. Graphic paper producers are claiming for further price increases in 2019. Producers are seeking an increase of 35-40€/tonne for newsprint and SC paper, 30-35€/tonne for CMR, and 8% for UWF and CWF grades.”

Laetitia Reynaud,
Policy Advisor at
Intergraf

Power of Print Seminar inspires

“The overarching theme of the day was to work together, to recognise the strengths and values of the print medium and show buyers, users and marketers why print is an essential channel.”

Two Sides



At the 8th edition of this seminar, organised by Two Sides UK, the value of print was showcased by a range of expert speakers.

Approximately 200 leaders from the print, publishing, marketing and advertising industries met in London for the annual Power of Print Seminar. Speakers explored the challenges, innovations and opportunities for print in today's multi-media world.

One of the highlights of the day was the presentation of Katherine Punch, Campaign Director at August Media. Katherine spoke about why creative agencies love print. She has been asked

to join Intergraf's Print Matters for the Future conference on 24 May 2019, so to hear more on this topic stay tuned. Another striking intervention was given by Joe Waterton, Head of Philanthropy at the NGO Macmillan Cancer Support. Joe highlighted the importance of trustworthy printed communications for people facing diseases in the age of misinformation. Kevin Vyse, Senior Packaging Technologist at Marks & Spencer dealt with the importance of sustainability for packaging choices.

For more information about this news: [Two Sides](#)

When print is gone it's gone. People need to be reminded now

“When there are so many people campaigning for this all over the world it gives strength to us.”

David Gold, Head of Public Affairs, Policy & Philatelic PR at Royal Mail Group



Keep Me Posted national and European campaigners and the Two Sides campaign met last month in London to pave a way forward.

Leaders of the Keep Me Posted campaign from all over the world met in London last month to share information and best practices. Participants at the Campaigners' Day heard information about Europe, the UK, Spain, Germany, Slovenia, North America, Australia, France, Portugal, Brazil and South Africa. Some campaigns were already up-and-running, while others were exploring the possibility of beginning a campaign. The Keep Me Posted campaigns are crucial in order to

protect the citizens' right to choose. Both paper and digital communications play a role, but one should not be prioritised above the other.

At the Two Sides Sustainability meeting with international colleagues, the importance of promoting the image of paper products was likewise made clear. Paper is sustainable and renewable and it is important for all campaigns to debunk the various misconceptions existing about the industry.

For more information about this news: agrace@intergraf.eu

Next Print Matters for the Future event in London



Intergraf's annual Print Matters for the Future conference will take place in London on Friday 24 May 2019.

Organisation has begun for our annual Print Matters for the Future event, held alongside Intergraf's General Assembly. In 2019, the conference will be organised with the WPCF (World Print & Communication Forum). While the General Assembly and WPCF meetings are for members only, Print Matters is open for anyone to attend. The conference will showcase key trends, case studies, consumer preferences and more.

Some speakers have already been secured

for Print Matters. Elvira Fortunato, Professor at NOVA University (PT), will present about paper-based electronics, while a representative from Circle Media (NL) will also make an intervention. In addition, BPIF, Intergraf's member association in the UK, and the winner of the 2019 Intergraf Student Award will present. Finally, Luke Lloyd from the IPC will present new research on advertising. For more details about this research you can refer to the front page of this publication.

For more information about this news: agrace@intergraf.eu

"Our Print Matters for the Future conference is an ideal opportunity for printers in Europe to meet and share ideas. With the agenda already filling up, next year's event is guaranteed to give printing professionals a wealth of useful information."

Beatrice Klose,
Secretary General
of Intergraf

Draft Brexit agreement under discussion



On 14 November, a draft Brexit agreement was published with the aim of ensuring a smooth UK exit from the EU.

Key provisions of the draft agreement aim to prevent a hard border between Northern Ireland and Ireland and to preserve the rights of EU citizens in the UK and UK citizens abroad. The agreement has been accepted by the EU27, although whether the UK will also accept it remains to be seen.

Due to the uncertainty, it is challenging to assess the effects Brexit may have on the printing industry. According to BPIF, Intergraf's British member association,

"three concerns stand apart" for UK printers: "general cost inflation, tariff barriers and non-tariff barriers". Many UK printers are also beginning to stockpile supplies. For SMEs in general the situation is also not yet clear. According to SME United, the association of Crafts & SMEs in Europe, "even in case of an approval of the deal, SMEs will have to wait [2-4 years] for the results of the negotiations to put the future relationship in a concrete regulatory framework."

For more information about this news: Euractiv

"Looming negotiation deadlines, intensified political manoeuvring and heightened uncertainty surrounding Brexit has led to sheer bewilderment within a significant proportion of the UK printing industry."

BPIF Printing
Outlook, Q4 2018

SHAPING THE FUTURE OF PRINT

Packaging Conference

Brussels
21 February 2019

THE EVENT

Wednesday 20 February

18:30-20:00, Welcome Cocktail

Thursday 21 February

08:30-17:00, Packaging Conference

19:30-22:00, Conference Dinner

Friday 22 February

09:00-12:00, Visit to European
Parliament

THE VENUE

Hotel Metropole
Place de Brouckère 31
1000 Brussels

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