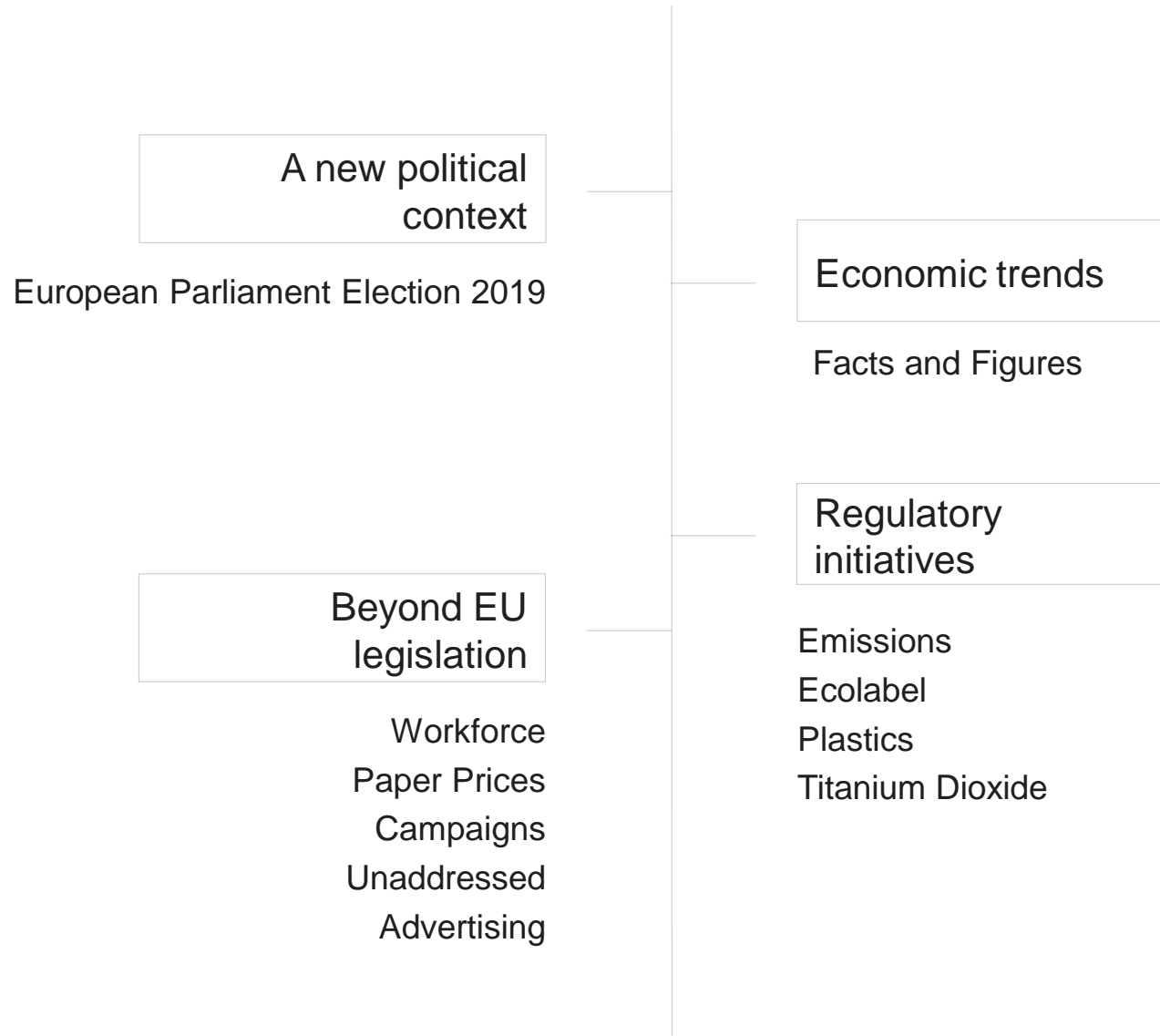


Current trends in Europe and legislative challenges facting the printing industry

Beatrice Klose
Secretary General



CONTENT.



A new EU political context



A new European Parliament



A new European Commission

“Europe must lead the transition to a healthy planet and a new digital world.”

Ursula von der Leyen

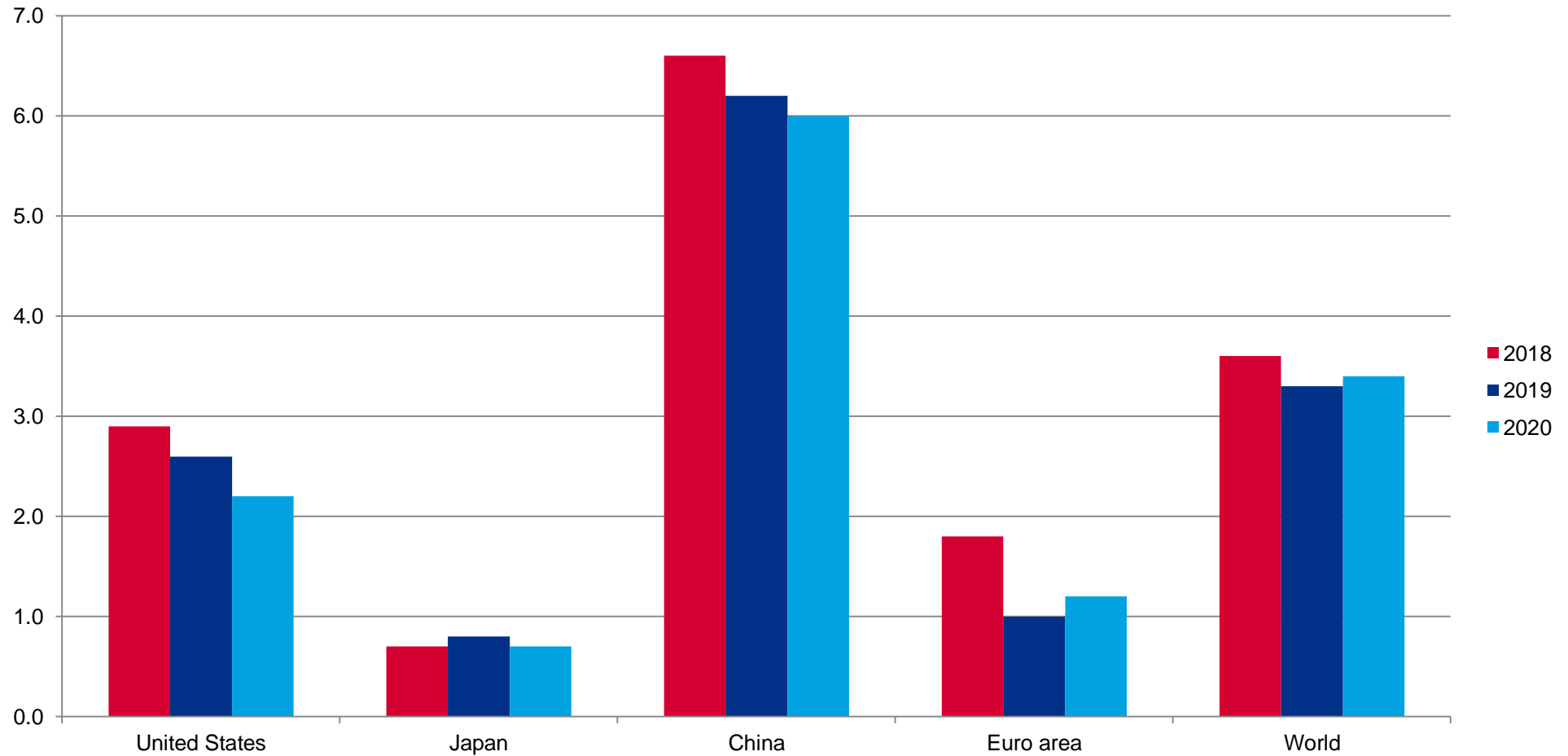
President of the European Commission 2019-2024



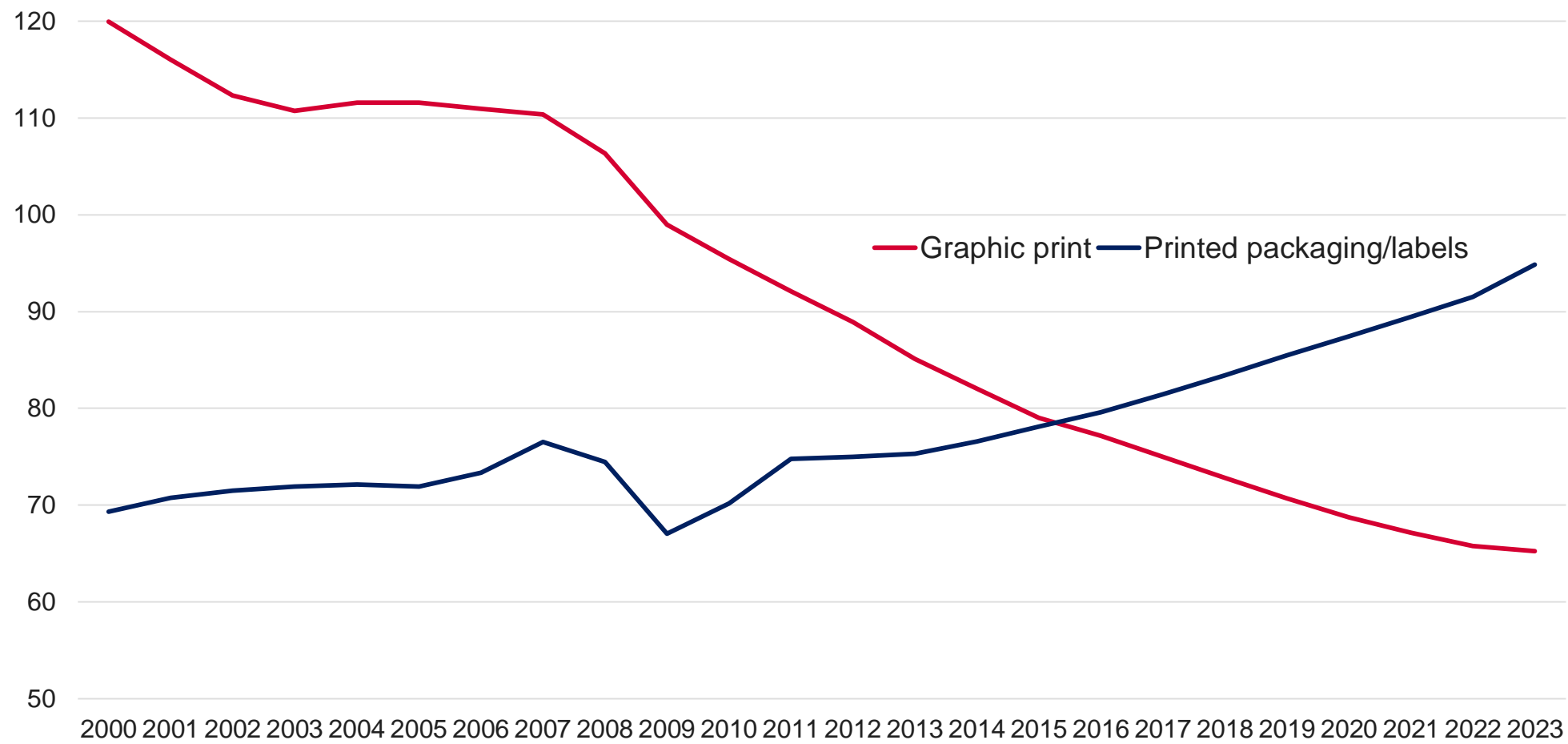
Industry trends



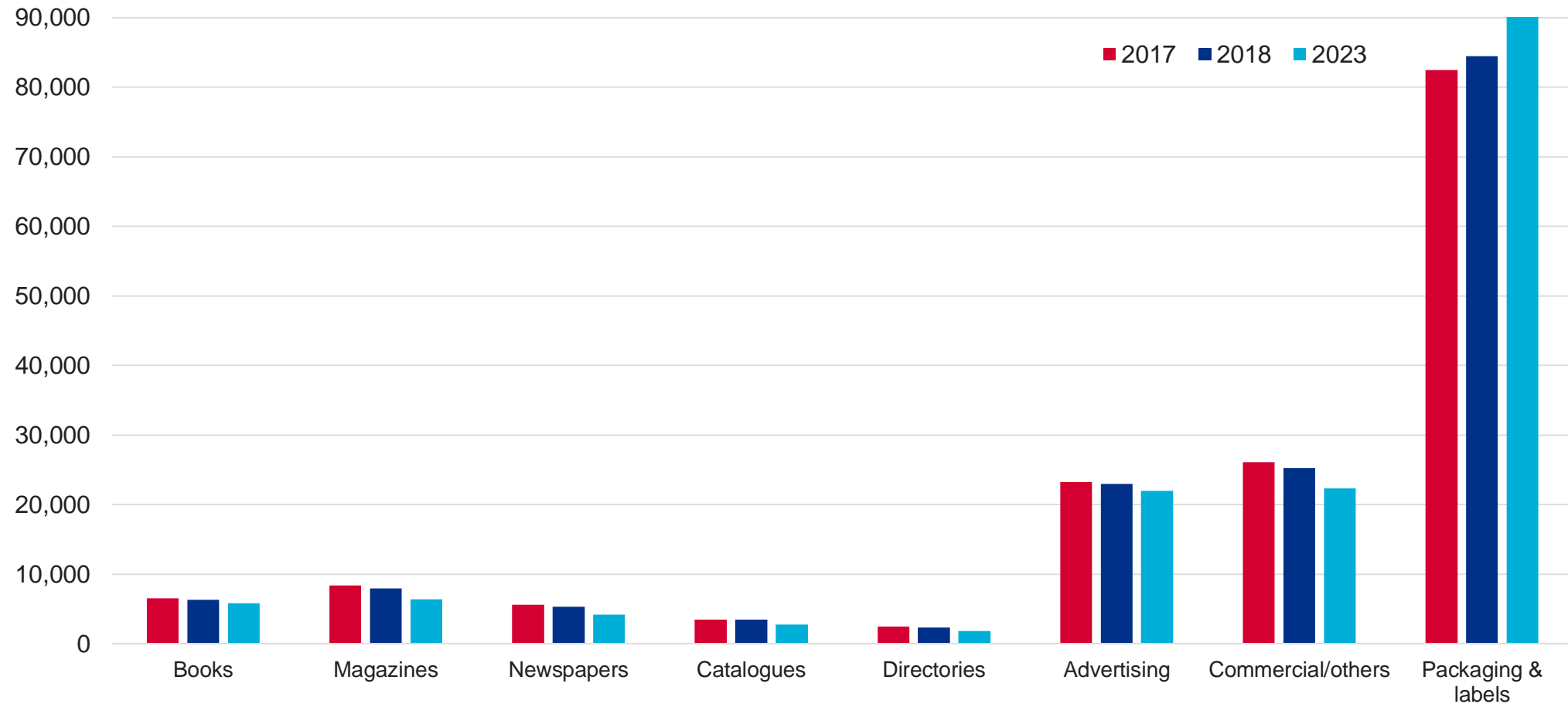
Political uncertainty, including over BREXIT, leads to decreasing growth anticipation in Europe.



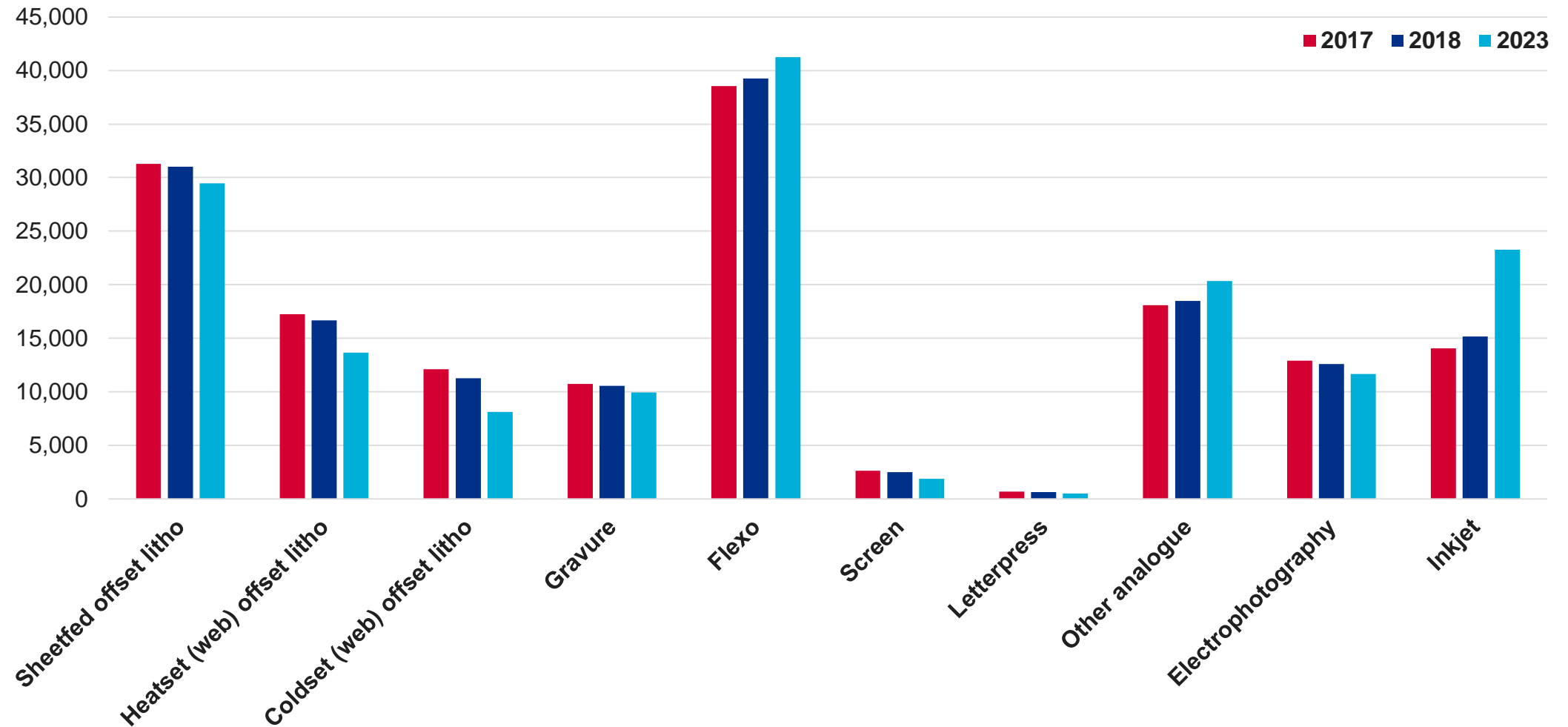
Packaging printing has surpassed graphic printing in 2016 .



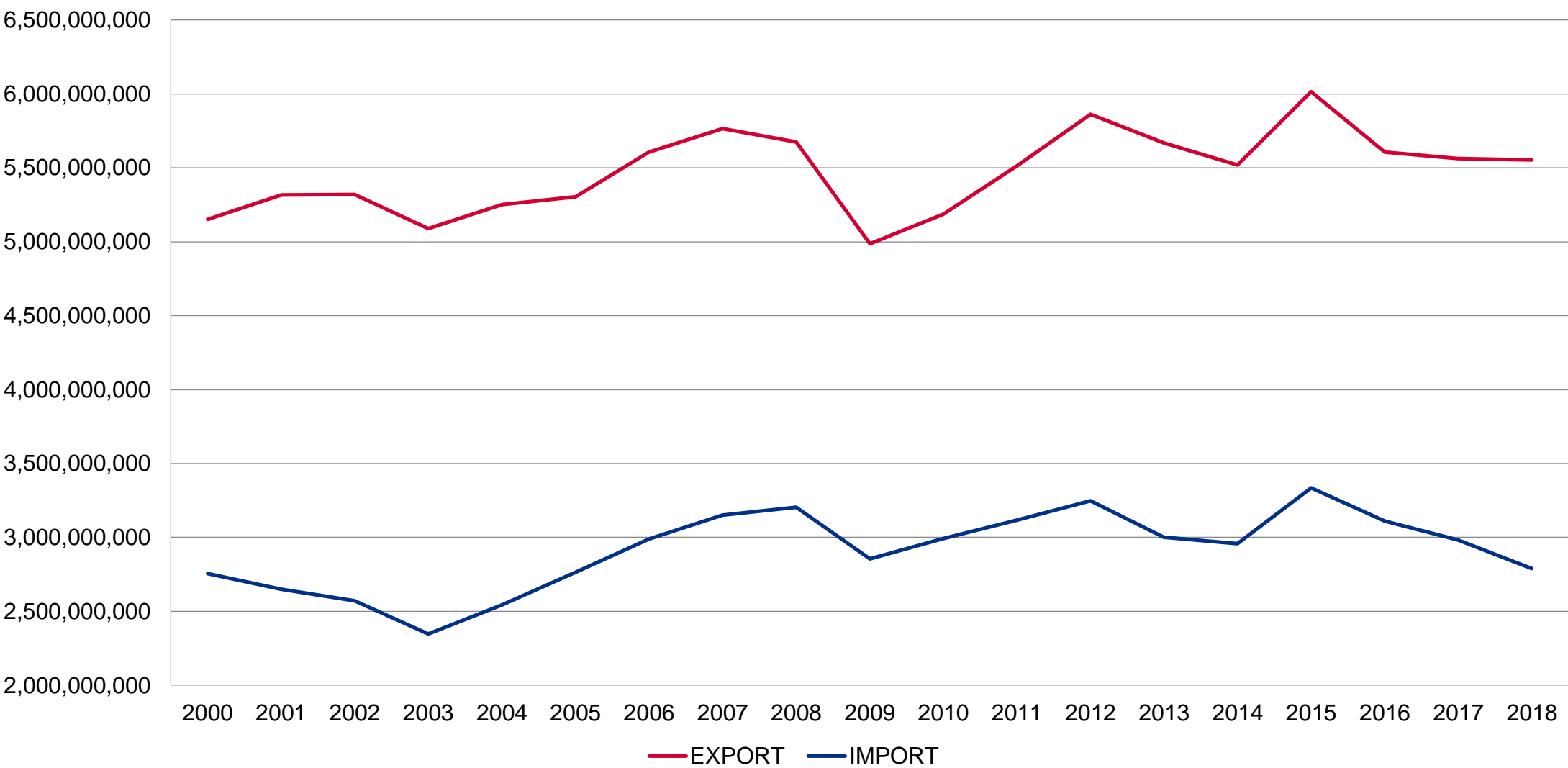
Printed Packaging and labels are leading.



Flexo and inkjet are the winners.

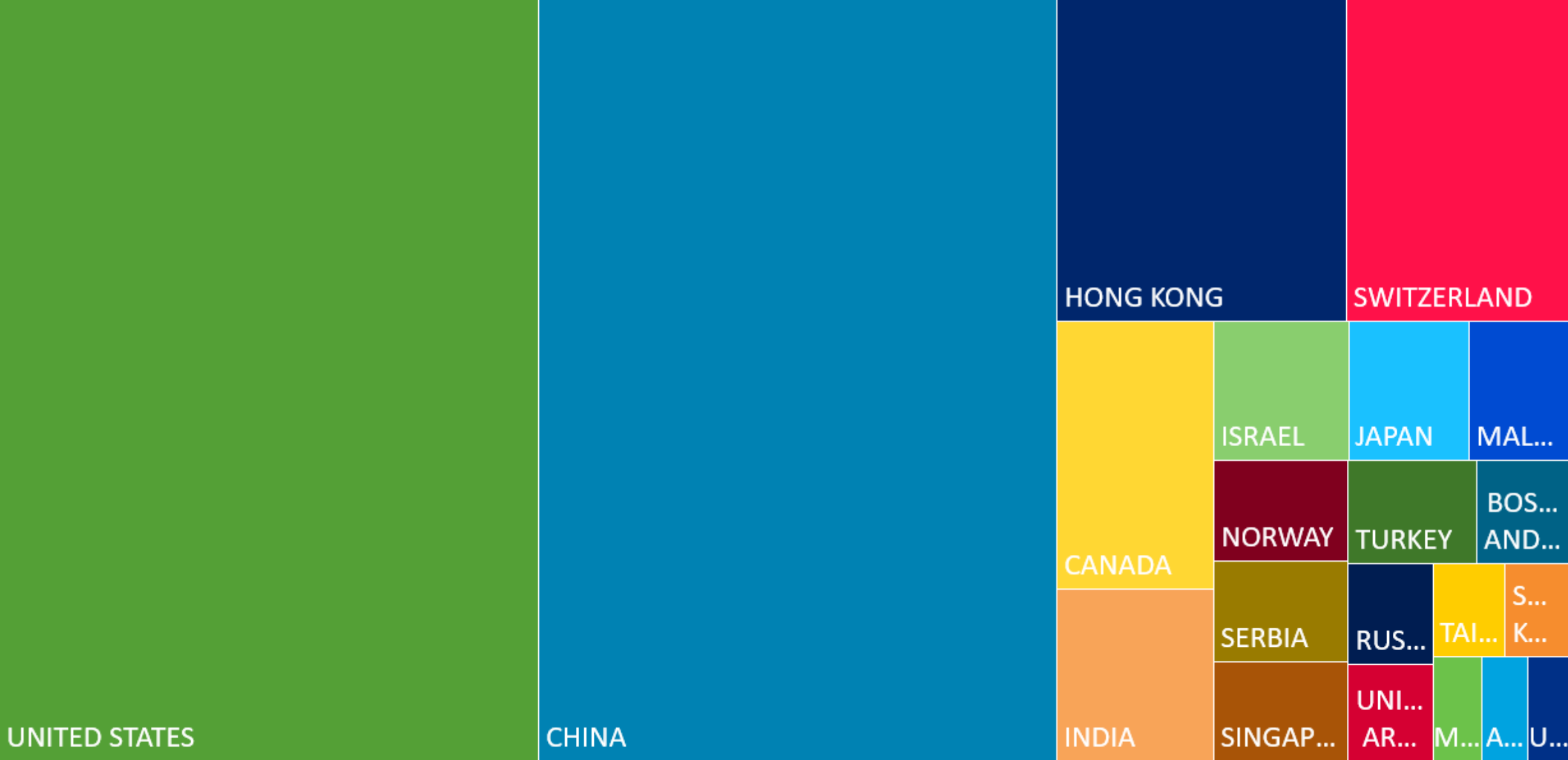


Although the large majority of its trade of printed products is intra-EU, the EU has a trade surplus of €2.7 billion to non-EU countries .

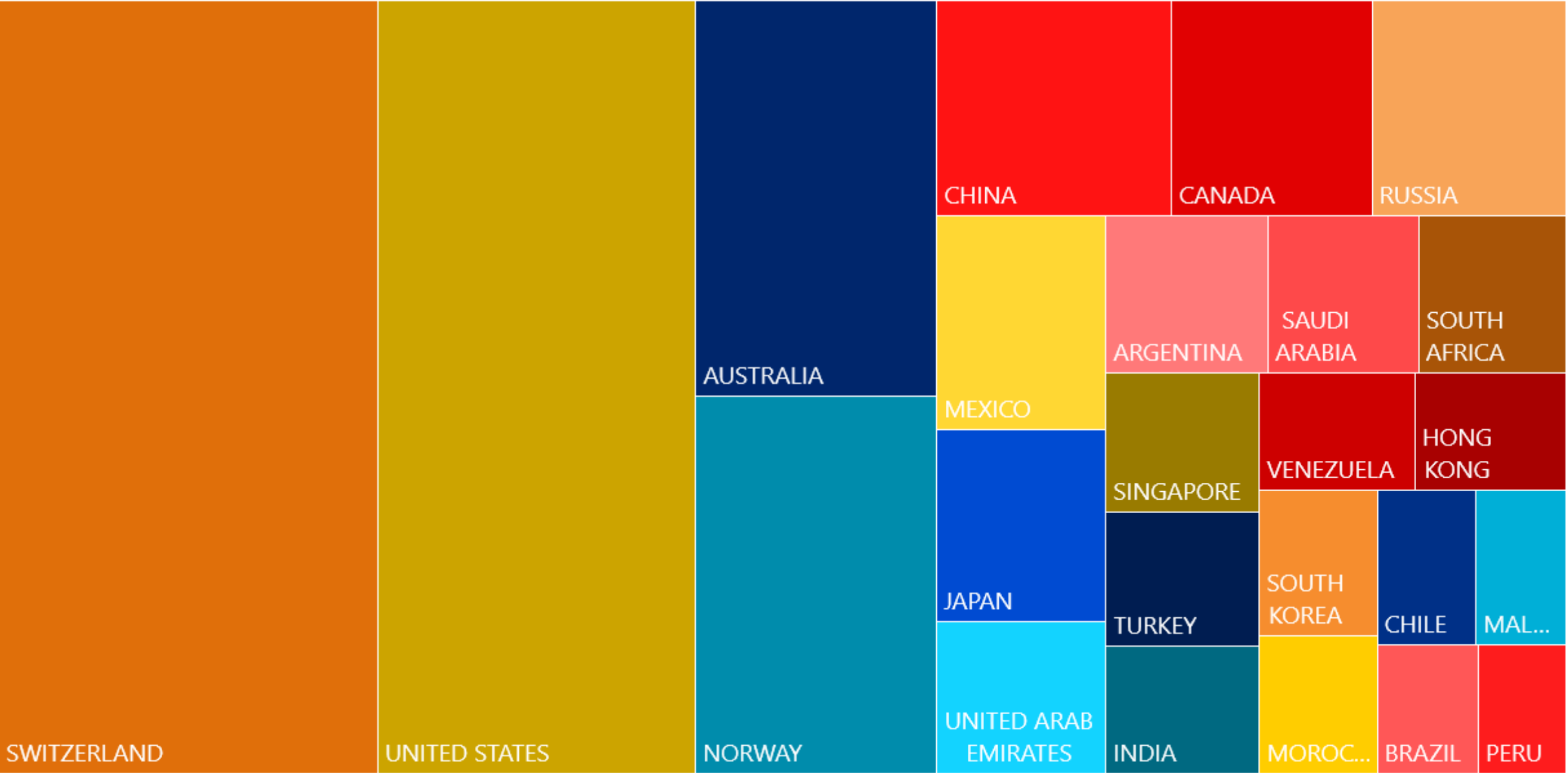


The EU imports printed products mainly from the US and China

(imports 2018).



Main EU exporting markets of printed products, 2018.



2019

ECONOMIC REPORT

Evolution of
the European graphic industry

INTERGRAF

EU legislative challenges



European Green Deal

- Achieving climate neutrality by 2050
- Transition to a Circular Economy
- A zero pollution Europe

What does it mean for the European printing industry ?

CLIMATE

Decarbonisation of European industrial sectors will increase pressure on largest printing plants, but:

- Good track records for VOC emissions in Europe: VOC emissions decreased by 50% in the past 30 years.
- By 2024, all printers consuming more than 200 tonnes of solvents per year (flexo, gravure, heatset offset) will have to update their environmental permits to comply with new legal requirements in terms of VOC emissions.

What does it mean for the European printing industry ?

CIRCULAR ECONOMY

Greener product policy with emphasis on eco-design of products, including on recyclability of products:

- Good track records on paper and board recycling in Europe: 71.6% paper recycling; 83.6% paper and board recycling
- New EU Ecolabel for printed products will be available in 2020
- Further pressure on eco-design of printed products (deinkability requirements, mineral oil content...)

What does it mean for the European printing industry ?

CIRCULAR ECONOMY

Restrictions on single-use plastics and expected new requirements to ensure that all packaging in the EU market is reusable or recyclable in 2030 will:

- Increase pressure for printed packaging, in particular printed plastic packaging
- Possibly create opportunities for paper-based packaging alternatives

What does it mean for the European printing industry ?

ZERO POLLUTION

Further restrictions on chemicals:

- New EU Ecolabel for printed products will be available in 2020
- Further pressure on eco-design of printed products (deinkability requirements, mineral oil content...)

Beyond legislative challenges



Shortage in skilled staff.

A magnifying glass is held over a newspaper page, focusing on the 'Job Opportunity' section. The text 'Job Opportunity' is large and bold, with 'EMPLOYMENT' in a smaller, bold font below it. To the left, there is a small box with the text 'TION AT: 205'. To the right, there is a list of job categories with corresponding page numbers: 'Accounting.....107', 'Administrative/Clerical.....110', 'Inventory.....123', 'Legal Administration', and 'Legal Engineering'. The background is blurred, showing other parts of the newspaper and a purple object.

Job Opportunity

EMPLOYMENT

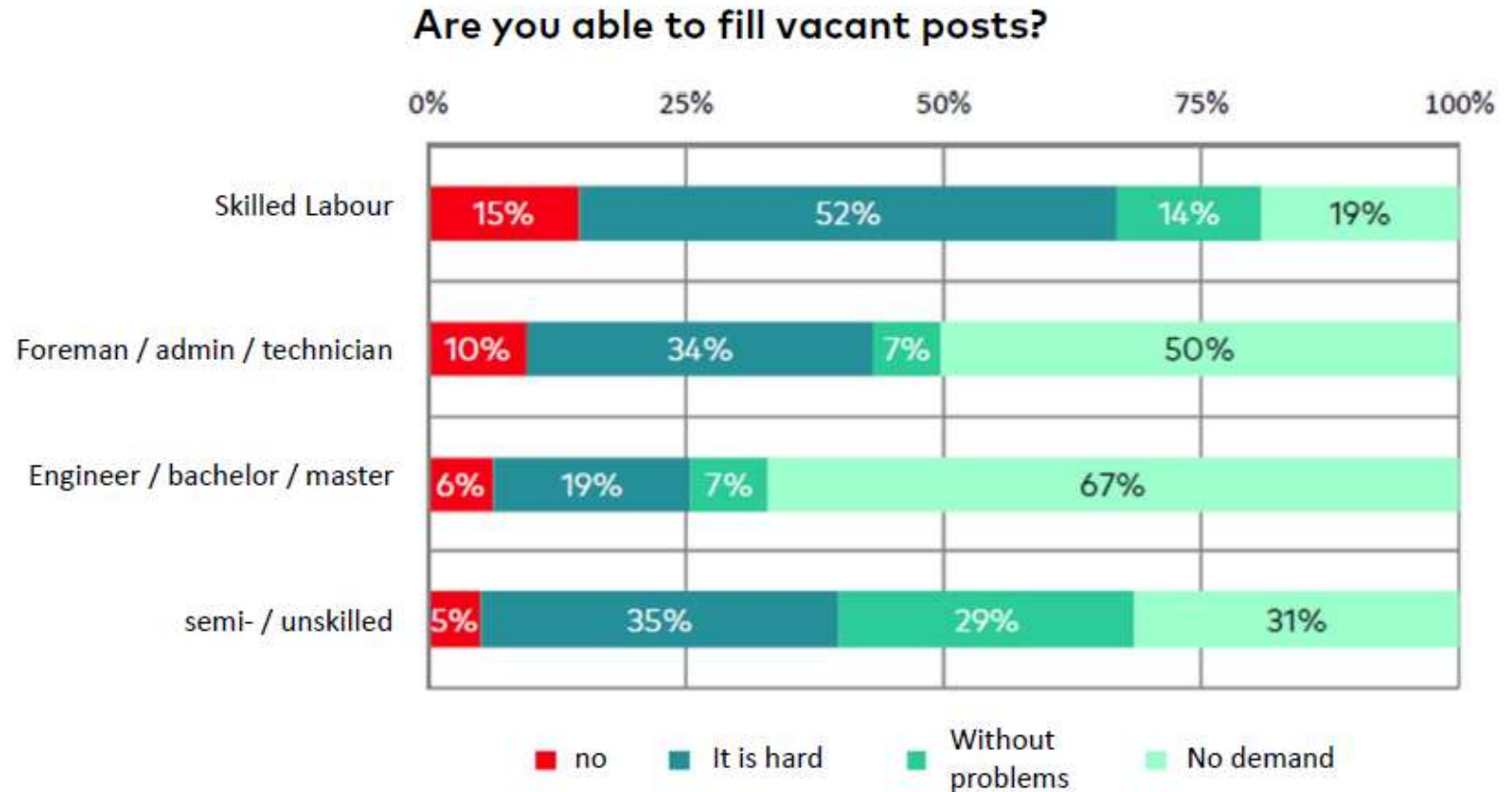
TION AT:
205

Accounting.....107
Administrative/Clerical.....110
Inventory.....123
Legal Administration
Legal Engineering

Shortage in skilled staff in Germany.

67% it is difficult to fill vacancies for skilled labour

Employers have difficulty filling their vacancies

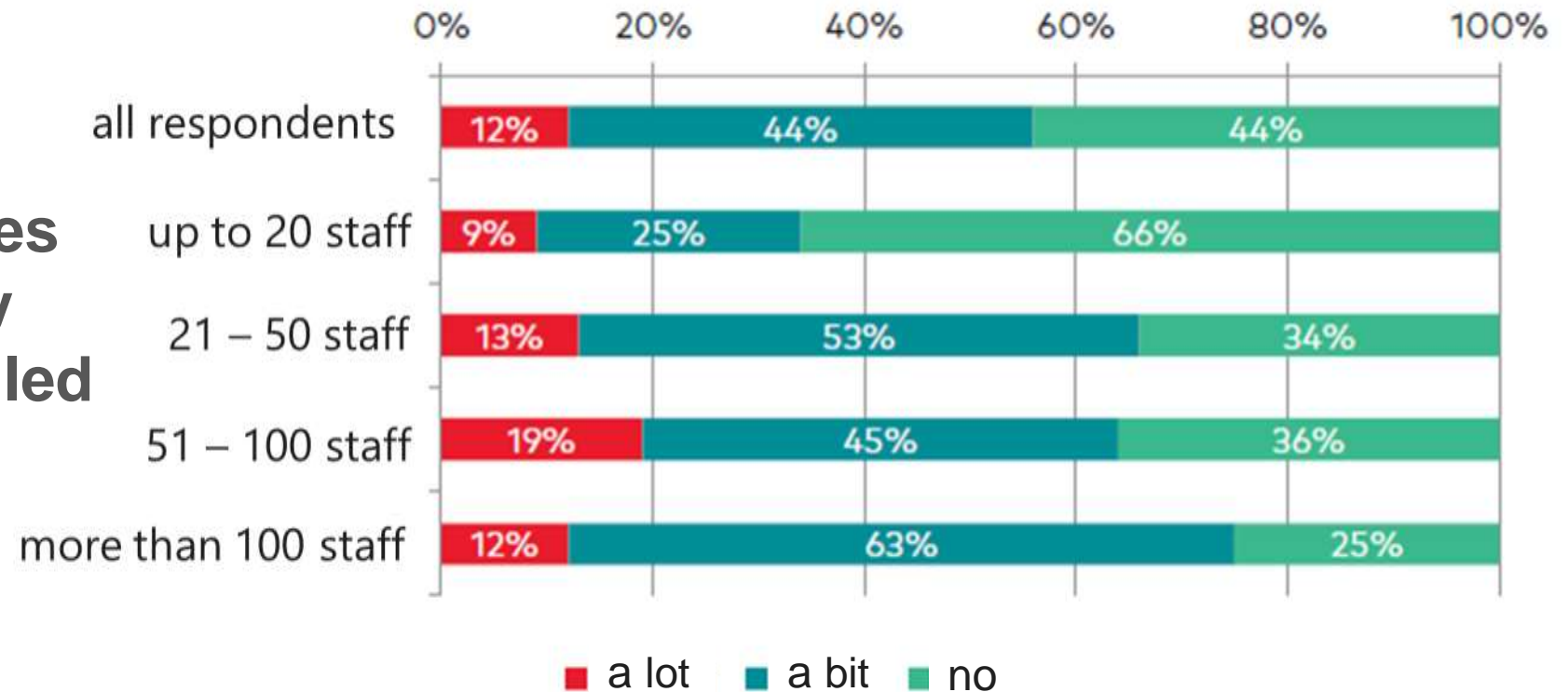


Shortage in skilled staff in Germany.

75% of larger companies cannot perform as they wish due to lack of skilled staff.

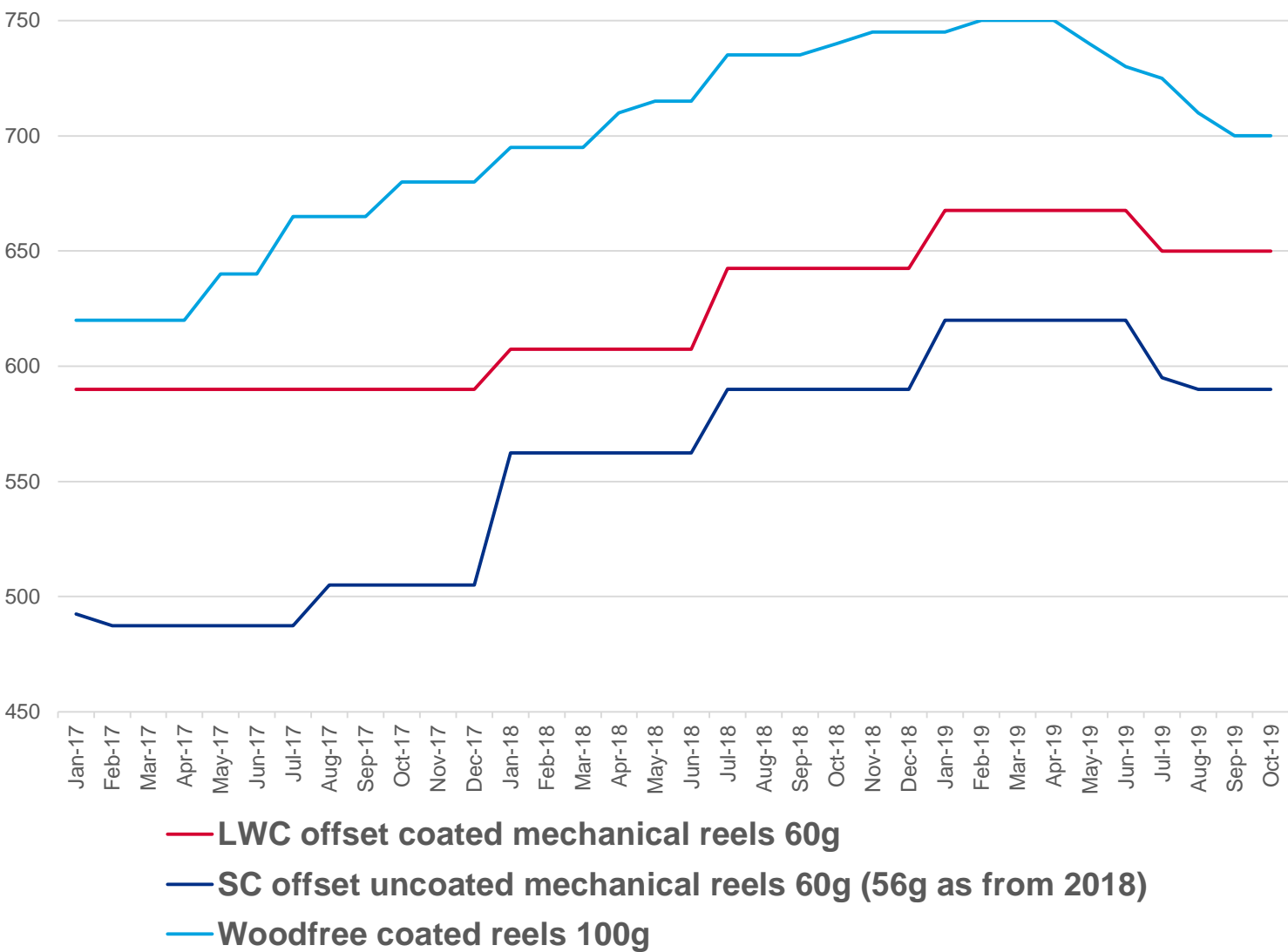
Are you hampered in your business activity due to not being able to fill vacancies?

(n=273)



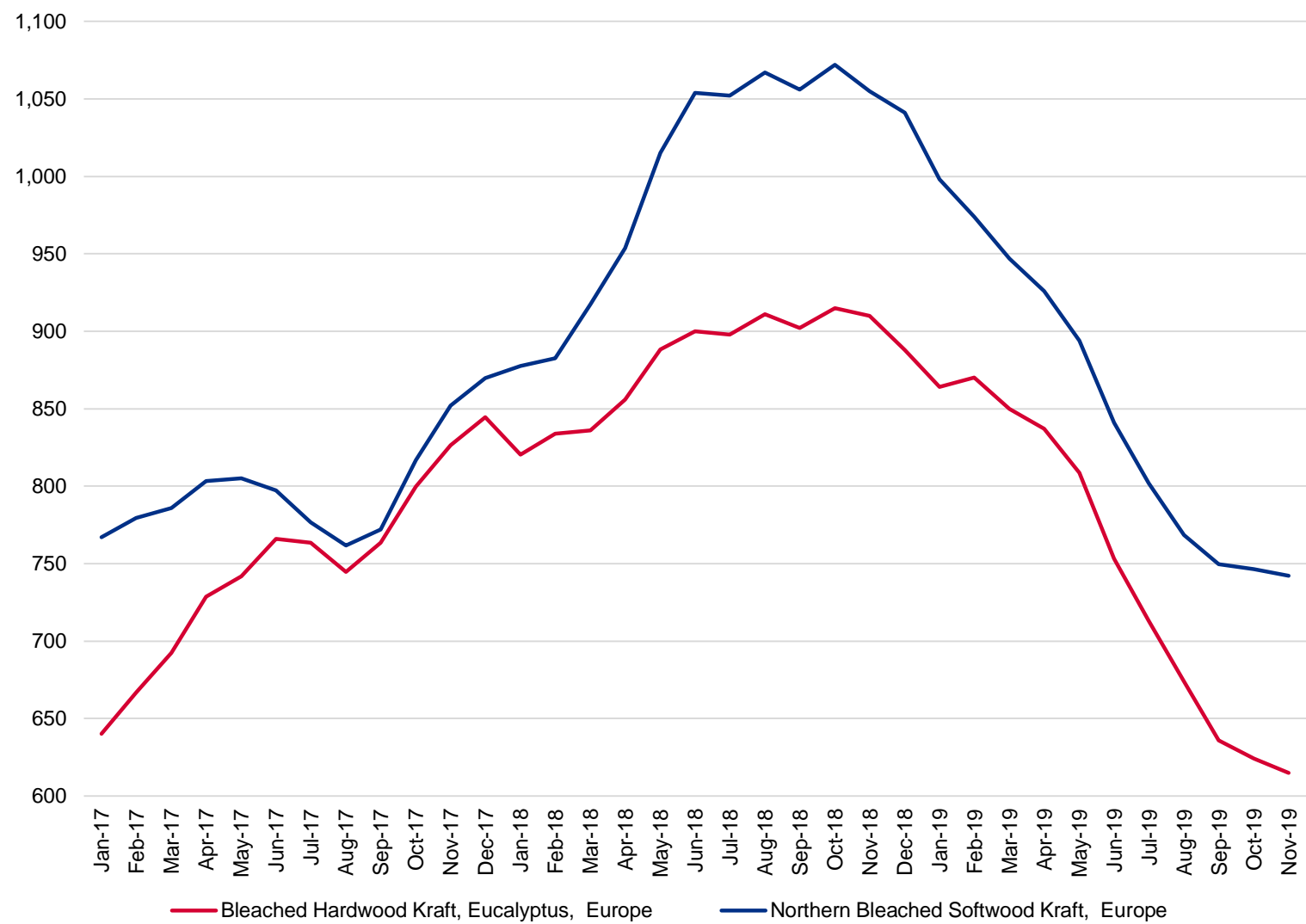
Graphic paper Prices in Germany 2017-2019.

Downward trend for paper prices after strong increase.



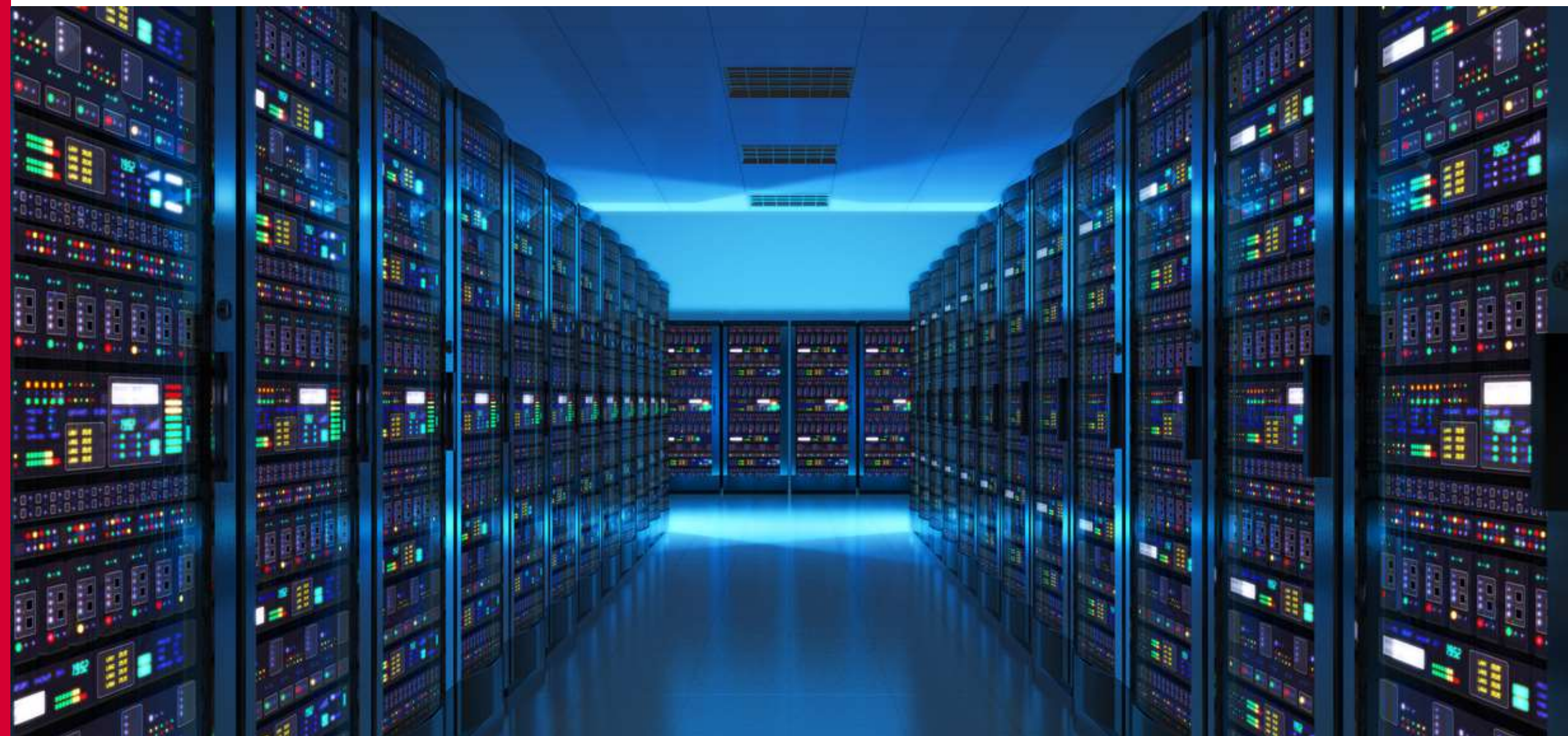
Decrease of pulp prices 2017-2019.

Pulp prices have peaked in summer 2018 and have decreased in 2019.

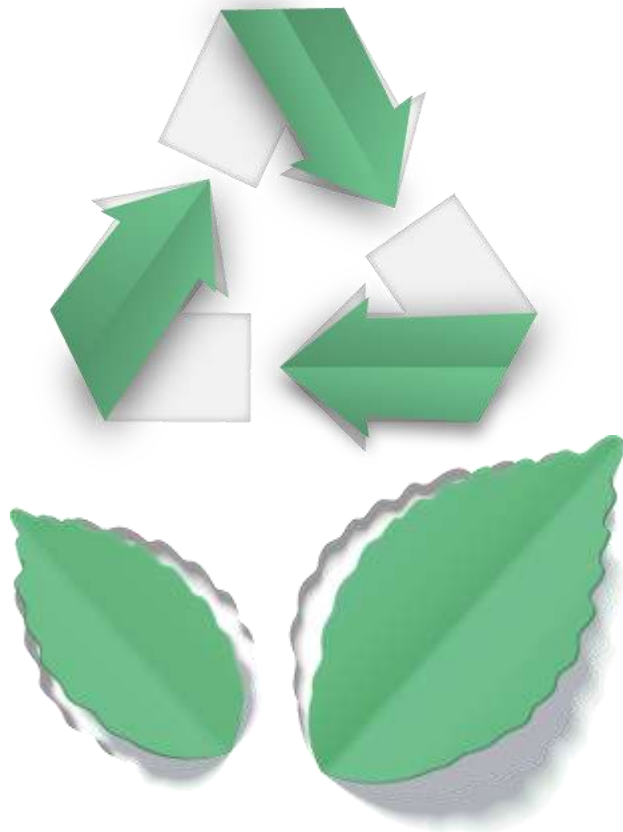


PULP PRICES, 2017-2019, IN €/TONNE

Digitisation.



Campaigning for print.



PRINT⚡POWER



Recognising the benefit of print for reading comprehension.

- A meta-study of 54 studies with more than 170.000 participants demonstrates that **comprehension of long-form informational text is stronger when reading on paper** than on screens.
- Digital environments also pose challenges. **Readers are more likely to be overconfident about their comprehension abilities when reading digitally than when reading print**, in particular when under time pressure, leading to more skimming and less concentration on reading matter.
- Contrary to expectations about the behaviour of 'digital natives', such **screen inferiority effects compared to paper have increased rather than decreased over time**, regardless of age group and of prior experience with digital environments.

2019 Results of the E-READ meta-study 2014-2018
Source: COST Action E-READ Stavanger Declaration:
<http://ereadcost.eu/stavanger-declaration/>

Restrictions on unaddressed printed advertising.

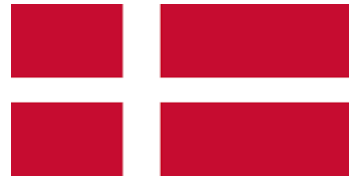


Increased pressure on printed products using environmental justification.

OPT-IN (doordrops)



TAXATION



EXTENDED-PRODUCER RESPONSIBILITY SCHEMES



THANK YOU!

Beatrice KLOSE
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