



**Deirdre Ryder**

**President of Global Print**

Welcome! It's with great honor that I share this January 2020 Issue of Global Print News with you all.

Our industry continues to innovate and evolve at lightning-fast speed and each of our fellow Global Print member associations continue to bring cohesion and leadership to a global industry as markets and economies around the world experience alternating highs, lows and uncertainties.

For the Association for PRINT Technologies, as I'm sure for many of you, there is no one-size solution for growth, success and the needs of our members. We have embarked on a journey that incorporates engaging and compelling content and experiences that drive success and bring relevance to a constantly changing industry. And, as you will see in our country report below, the many new and different initiatives that we are undertaking.

Please enjoy reading what your fellow Global Print members have shared. I look forward to our meeting in Düsseldorf in a few months.



## UNITED STATES

### News from The Association for PRINT Technologies (formerly NPES)

#### U.S. 2020 Economic Overview

For the U.S. economy overall, [Kiplinger](#) expects growth of 1.8% in 2020 compared with an expected 2.3% in 2019 and 2.9% in 2018. Business spending in the U.S. has been subdued by uncertainty about a trade deal, the fallout from Brexit and angst over the presidential election. But with unemployment at decades-long lows, consumers, who account for the bulk of the U.S. economy, remain a strong underpinning. So does the Federal Reserve (the Fed), which has cut short-term rates three times since June. Kiplinger expects the unemployment rate to inch up to 3.8% in 2020 from 3.6% in 2019, and the Fed to cut rates at least once early in 2020.<sup>1</sup>

According to the [APTech Advisor](#), a monthly macro-economic outlook report produced by ITR Economics, annual industrial activity in the U.S. edged lower in October from a likely August 2019 peak. The decline looks likely to persist into mid-2020, after which, activity will subsequently rise into at least late 2021. The U.S. economy will return to upward business cycle momentum in the second half of 2020. For many businesses, the renewed business cycle momentum will necessitate increased capacity by 2021.<sup>2</sup>



#### Manufacturing

- Annual Total Manufacturing Production is declining but is 0.5% above the year-ago level
- Decline in Production is expected to persist through the coming quarters
- Our expectations for Machinery New Orders suggest that Production will reach a business cycle low around mid-2020

#### What's Happening at the Association for PRINT Technologies (APTech)?

2020 signals a ground-breaking year for the Association for PRINT Technologies (APTech) with a new direction and a flurry of new products, new membership categories and benefits.

[Brand Print Americas 2020](#) is a new collaboration between the Association for PRINT Technologies and Tarsus Group, the organizer of Labelexpo Americas. The show will be held at the Donald E. Stephens Convention Center in Rosemont, IL from September 15-17. Co-located with the 2020 edition of Labelexpo Americas, Brand Print Americas will bring together the commercial print and the label converter communities and provide exhibitors and attendees an opportunity to explore solutions that will enable them to expand their businesses. "Our collaboration with Tarsus," said Thayer Long, president, APTech, "will connect two vibrant audiences providing both groups new and expanded opportunities. This event will be for the innovative leaders who know that this is the best time to be in print and are ready to take advantage of what the industry has to offer."



Additionally, APTech has also announced a series of new programs and services for their members to meet the specific needs of those who are in the print industry. We realized that there is a desire to have honest conversations about how to excel in business and it's no longer about speeds and feeds, but about what you can deliver to the end-customer," said Long. "To push this idea of connection forward, we hosted a new event at PRINT 19; the LeadingPRINT CEO Summit. The LeadingPRINT CEO Summit brought APTech's [LeadingPRINT](#) magazine to life. Panelists were all previously featured in the magazine during the past twelve months.

This summit was the first in a series that the association is working to deliver in 2020, along with several other programs that will be announced at a later date, including [EDgage](#), a dedicated program for brand owners and marketers in the higher education space. "This new publication supports our mission as an organization to help the print community by creating awareness for print and the value of print to highly competitive vertical markets," says Thayer Long. "We're excited about this highly focused periodical to support higher education marketers. It is our goal as an association to deliver solutions that will drive success—and we believe EDgage will do just that."



## APTech Research

Keeping up with the times, APTech's valued PRIMIR research brand has added a popular product in 2019 with the launch of the [Business Intelligence Series](#), which provides quick-read updates to several recent research studies. Each reporting distills key findings from the original report, mixed with updated facts and figures, into a roughly 10-page report that is available to all members of the Association. Six reports will be produced each year.



## And much more...

Summits, Podcasts, Videos and Newsletters to keep members informed of industry changes impacting their and our business. Coming up next for us will be the first [LeadingPRINT Summit](#), happening April 28, during the National Postal Forum in Orlando, Florida, U.S.

And we'll see you all in Düsseldorf for drupa 2020.

1. Source: <https://www.kiplinger.com/article/business/T019-C000-S010-gdp-growth-rate-and-forecast.html>
2. Source: <https://www.printtechnologies.org/globalassets/market-data/aptech-advisor/advisor-monthly/ap-tech-advisor-december-2019.pdf>



**CHINA**

## News from PEIAC

### News

PEIAC will have general election on 18<sup>th</sup> Dec. 2019 and new council will be elected.

### Import and Export

From Jan. to Sept. 2019, import and export of printing machinery and material increased by 1.6%. Import of printing machinery and material decreased by 7.8%, export of printing machinery and material increase by 10.2%.

### Characteristics and Trends in Chinese market

Summarizing the exhibition of Print China 2019, there are six obvious characteristics in terms of technology development and market demand:

1. Offset printing equipment is still being sought after by the market;
2. Digital printing technology rapidly penetrates into all fields of the industry;
3. It becomes development trend that offset printing and digital printing technology integrate;
4. It's frequent to see innovation results of independent research and development;
5. The thinking of building printing network platform is increasingly clear;
6. Collaborative development supports the high quality rise of printing industry.

In addition, we should also pay attention to the development trends of the industry in the next few years:

1. In the next few years, Chinese economic development will stand at a new starting point. It will continue to develop on the basis of a total economic volume of 90 trillion yuan in 2018, but it will face many risks and challenges. Generally speaking, the important period of strategic opportunities for China's development has not changed, and the fundamentals for long-term development have not changed. There is still great potential for development.
2. Due to the rising cost and the pressure of environmental protection, the downturn of paper industry will continue.
3. It is worth expecting the application of artificial intelligence in the printing industry.

4. Although the packaging market is developing well, the trend of industry integration is becoming more and more obvious, some packaging enterprises need to be cautious and optimistic.
5. The label industry is facing rapid development.
6. Publication printing will usher in new development.



**GERMANY**

News from VDMA

## Megatrends at drupa 2020

### Printing technology of the future is sustainable, fully networked and smart thanks to Artificial Intelligence

- drupa 2020 makes the future of printing and paper technology tangible
- All-round networked customers and processes
- Focus on Artificial Intelligence and Platform Economy
- Meeting the challenges of the Circular Economy

**Frankfurt, 20. August 2018** – "As the world's leading trade fair, drupa is the stage every four years for manufacturers of printing and paper technology on which they present state-of-the-art machinery - and look to the future together with users," explains Markus Heering, Managing Director of the VDMA's Printing and Paper Technology Association. With the anticipation of the trade fair, the excitement about the exhibitors' technological innovations is rising.

In future workshops with the member companies of the VDMA association, four clear megatrends have emerged in recent months. They will shape processes of the print industry in the 2020s and beyond. The visions of drupa 2016 will serve as the basis: the integration of fully automated and networked Print 4.0 process chains will remain an ongoing innovation task for print shops, especially in the light of globalization. "Based on the OPC UA protocol, manufacturers of printing and finishing technology increase interoperability along process chains. This effectively adds value for all sectors of the printing industry," says Heering.

#### **Print 4.0 becomes the basic technology**

Wherever implemented, Print 4.0 processes are already bearing fruit. They help customers achieve some spectacular successes:

- Productivity increases in the double-digit percentage range.
- Much better utilisation of capacity (up to twice the previous value)
- Significantly reduced waste and storage
- Drastically reduced down times

With automation increasing quality and productivity while reducing labour costs, digital connectivity offers further benefits in terms of management decisions: Sensor-based process integration gives decision-makers complete transparency with just a few clicks. Information flows undisturbed, because machine builders really put all process flows to the test for digital networking and identify efficiency potentials in the process. "These Print 4.0 solutions are available today. Now it's time for us as machine manufacturers to open up new chapters in digitization that promise concrete customer benefits," says Heering.

## Four Megatrends at drupa 2020

### 1. Artificial Intelligence

Sensor networks and camera systems monitor quality-assured production in detail, so that enormous amounts of data come together. These data should be put to good use. "Big data algorithms and **Artificial Intelligence (AI)** are key to transforming floods of data into actionable insights," underlines Heering. The innovative methods are able to detect hidden patterns that announce impending machine downtimes. They can use process data to draw conclusions about the exact condition of wearing parts, maximizing their lifespans. Besides that, they can help explain why one machine may perform better or worse than others or establish optimum machine settings for different consumables.

Since far more parameters and data flow into the analyses than before, it gets possible to trim control tasks, production planning, material usage and logistics to maximum efficiency. Virtualized development methods and digital twins as the basis for the use of data glasses in service and sales, the development of self-learning machines and even autonomous printing processes on an AI basis only indicate the potential. According to Heering, mass customization (product individualization in mass production) also offers an interesting application-area for **Artificial Intelligence**. "Various AI applications will be on show at drupa 2020. This megatrend will trigger a boost in efficiency in our industry," he says.

### 2. Connected Customer

Digitalization is changing not only print shop processes, but also customers and their expectations. **Connected Customers** are always online, and accustomed to convenient and fast online ordering processes. If they do not immediately find what they are looking for, they switch to the next provider. They compare prices and offers, expect to see creative ideas implemented instantly and often this type of customer demands high environmental standards.

In order to meet these demands, print service providers require highly efficient web-to-print platforms combined with a flexible production base. **Connected Customers** expect an increasing variety of substrates, are keen on bespoke solutions including personalization - and clearly favour shorter runs printed. If required, they can conveniently reorder online, often with very tight time limits.

Modern printing and paper processing technology is able to implement such on-demand repeat orders at the touch of a button. The machine settings of stored print jobs will be reconfigured automatically, making sure to reproduce the work in identical quality. If the provider is not able to fulfill a customer request with his own equipment, web-to-print platforms can automatically redirect it to a partner company. Digital integration, in this scenario, includes the ordering process.

The transitions between the Internet and reality are blurring. New interfaces are needed to create convergence between the digital cosmos and reality. Print can create such links by means of QR codes or printed electronics. Packaging no longer needs to convey all of the product information on its own. For endless possibilities for new interactive campaigns and designs are opening up, as the customers are always on the ball. The Internet of Things (IoT) will further impact consumer behavior. "The Printing industry can play a key role as provider of interfaces, as long as it takes a proactive approach and sees the **Connected Customer** trend for what it is: a fantastic opportunity," explains Heering. drupa 2020 will also be a showcase for future solutions in this area.

### 3. Platform Economy - Industrial Internet of Things (IIoT)

The Internet of Things (IoT) does not end with the Connected Customer. Far from it. Equipment manufacturers, their suppliers and partners as well as the machines themselves are becoming part of a comprehensive digital network. In the Industrial Internet of Things (IIoT), they interact within platforms, each becoming a pivotal hub. Here, players can get in touch quickly and securely. This calls for sophisticated access management that protects information and raw data from unauthorized access - and supports collaborative processes between print service providers, manufacturers, suppliers and customers.

While the **Platform Economy** is well advanced in the retail (Amazon, Alibaba or Ebay), media (Netflix, Youtube) and banking sectors, it is still in its infancy in the manufacturing industry. But the run on the growing variety of industry-specific IIoT platforms suggests that this will change soon. Companies are realizing that the **Platform Economy** and its challenges offer a shortcut to 'digital readiness'; The new ecosystems help shake off old thinking patterns that previously stood in the way of fast innovation. The platforms are a fertile ground for networking the players within Print 4.0 and for developing new mindsets in companies. IIoT platforms will accelerate the transformation to Print 4.0.

### 4. Circular Economy

Today's well-informed customers insist on sustainable, environmentally friendly products. The international community has agreed to limit global warming to 1.5 °C or a maximum of 2 °C. Authorities are introducing ever more stringent waste regulations. Without packaging, on the other hand, even more food would go to waste, products get damaged in transport, medication mixed up or chemicals spilled. Packaging is a must!

However, it is important to consistently manage raw materials in cycles. "This entry into the **Circular Economy** is the fourth megatrend that we are currently observing," explains Heering. Paper and

cardboard, as well as metal-based and glass packaging, could play a major role here. Currently the recycling of plastic packages is starting a new dynamic, too.

Machine manufacturers have done their homework in energy and resource efficiency. Modern paper mills generate more energy than they consume. More than 90 percent of the water used is recycled and returned to nature in high quality. In Europe, a paper fiber is recycled 3.6 times on average before it has to be thermally utilized for quality reasons - and energy is generated in the process. Printing press manufacturers have long been offering CO<sub>2</sub>-neutral machines and equipment. Finally, resource conservation is also an important driver for the development of fully networked, highly efficient process chains.

In view of the **Circular Economy**, opportunities for digital collaboration between packaging designers, brand owners, printing press manufacturers and recycling experts as well as providers of packaging materials or inks should be utilized. Upcycling, even more than recycling, is the name of the game. "It takes creativity to match the right packaging with the right product while maintaining a clear focus on circularity," underlines Heering. drupa 2020 will address these questions - and present sustainable solutions in this socially important area. "It must be our industries objective to solve today's problems through consistent recycling and upcycling. This should already be anchored in the design and then also implemented in production technology," he explains.

## Conclusion

Heering's conclusion: "As exhibitors, we are looking forward to drupa 2020. From 16 to 26 June 2020, we will not only be seeing Print 4.0 applications in Düsseldorf – but also experience pioneering technologies in the areas of **Artificial Intelligence**, **Connected Customers**, the **Platform Economy** and the **Circular Economy**. Especially against the backdrop of constantly rising customer expectations in an increasingly globalized printing industry, it is crucial for the players to remain at the cutting edge of technology. "For eleven days, drupa will bring together all relevant trends and innovations in our industry and provide visitors with a truly comprehensive knowledge update", he emphasizes. "Whoever wants to know where our industry is heading should not miss this opportunity".

## VDMA and Messe Düsseldorf inform

### drupa world tour starts this week in Mexico City

- Over 35 events in 27 countries on five continents until spring 2020
- High-ranking delegations present the concept of the world's leading trade fair for print, cross-media und packaging solutions as well as the most important industry trends

**Frankfurt, 10. September 2019** – The starting signal for the drupa world tour 2019/20 will be given on 10 September 2019 in Mexico City. After that, the tour will continue at close intervals until spring 2020. In September alone, seven more conferences and events will follow in Ecuador, Peru, Colombia, Canada, Brazil, Chile and Argentina. By April 2020, events will follow in twelve Asian countries, the USA, Eastern Europe, some EU countries and North Africa. A total of 35 trips to 27 countries worldwide are currently planned. The organizers of the world tour in the run-up to drupa 2020 are Messe Düsseldorf GmbH and PrintPromotion GmbH.

"We are looking forward to exciting meetings with industry experts, journalists and representatives of local media partners, industry and trade associations," says drupa Director Sabine Geldermann. High-ranking delegations consisting of the CEOs of various printing press manufacturers and leading representatives of PrintPromotion and Messe Düsseldorf will present the most important trends in printing and paper technology, present innovations in the graphics industry and packaging printing, and will inform about innovative applications in the field of industrial and functional printing. Of course, they will shed light on the status of preparations for drupa 2020. "Our aim is to arouse some fascination for the applications and possibilities of modern printing technologies in an increasingly networked world and to make experts want to visit drupa in Düsseldorf from 16 to 26 June 2020," underlines the Managing Director of PrintPromotion GmbH and VDMA's Printing and Paper Technology Association, Dr. Markus Heering.

### **Visionary technologies and multiple drupa highlights**

In the run-up to drupa 2020, four future trends are emerging. They will also be the focus of the world tour conferences:

- Press manufacturers are driving forward the networking of their processes and are making increasing use of the possibilities offered by **Artificial Intelligence (AI)**
- Business models and cooperation between machine builders, customers and other industry players are undergoing rapid change, leading into the **Platform Economy**

- In today's world, customers are online around the clock. The print and media industry must adapt to the changing needs of **Connected Customers**
- Growing environmental awareness, stricter regulation and finite resources require the transition to a **Circular Economy**. The print and paper industry has long been developing appropriate solutions that will meet with a rapidly growing demand in the future.

Many of the close to 1,800 exhibitors at drupa 2020 will highlight corresponding approaches. "The exhibition grounds are almost fully booked. The current booking level is above that of the 2016 edition," confirms Geldermann. The positive booking situation clearly underlines the diversification of the product portfolios of exhibitors from around 50 nations - including around 400 new exhibitors along the entire value chain - which they see as a further indicator that the industry is conquering new territory and tapping new growth potential.

### **Networking of actors and processes**

The attractive at drupa 2020 is also having an impact. Innovators in particular will find a wide range of presentation and networking options. For example, at drupa touchpoints, which are special exhibition areas that bring together a wide variety of experts from CEOs to design students or from global brand owners to start-ups, to discuss future solutions and designs in packaging, opportunities of industrial 3D printing or the possibilities of fully networked process chains in textile printing.

The drupa cube - the central conference area - will focus on how companies from the printing, media and packaging industries and their suppliers from the mechanical engineering sector can adapt to the rapid changes resulting from digitization. "We will be discussing such challenges on the drupa world tour and pointing out the possibilities for networking during drupa," explains Geldermann. Markus Heering adds: "In the globalized printing industry, networking is almost synonymous with future viability. That is why we are all convinced of drupa 2020's priority setting and its focused issues. With the world tour, we want to carry this message into all important target groups and markets worldwide.

From 16 to 26 June 2020, drupa will offer a 360-degree overview of modern process and value chains for the print industry. As a global industry meeting place, it brings together all the key players. The drupa world tour will promote this opportunity worldwide. "We spare no effort to convince visitors that drupa is of the utmost relevance for their business development and the future of their companies," emphasizes Heering. After all, only those who stay on the ball technologically will be able to permanently meet the increasing quality demands on print products, the ever-shorter delivery times and the high cost pressure.



News from **PICON**

**GLOBAL PRINT: UK MARKET REPORT BY MARK BRISTOW, CHAIRMAN, PICON**

Having succeeded Gerard Heanue in July, this is my first report as Chairman of Picon, and I thought it wise to look back at how my predecessors approached the task. It will surprise nobody that, from June 2016 onwards, Brexit has figured prominently, with successive reports providing a series of snapshots of the mood of UK businesses, both in the printing industry and beyond.

The overriding theme has been uncertainty, which is always bad for business. However, in this respect at least, this report offers a distinct light at the end of the tunnel, because as I write a General Election is a few weeks away. Politics in the UK are so volatile that it would be foolish to predict the outcome with any certainty, but with the latest opinion polls showing a clear lead for the Conservative party it is possible that early in 2020 we will at last know the shape of the withdrawal agreement. True, this will only mark the start of further negotiations, but many businesses will welcome it as a sign of progress.

**UK economic performance and outlook**

Little has changed in the wider UK economy since the last report, but it should be noted that much of the most recent data originates in the quarter to September — i.e, before the latest withdrawal agreement was passed by the UK parliament, and the decision to hold an election.

According to the Office for National Statistics (ONS), the UK economy grew 0.3% in Q3, and thus avoided a technical recession (defined as two successive quarters of contraction). The increase, says the ONS, was driven largely by the dominant services sector and a particularly strong July. Year-on-year growth in the three months to September 2019, however, was 1% — the lowest rate in almost a decade. Stockpiling ahead of the (now missed) October 31<sup>st</sup> Brexit deadline is also likely to have had an impact, which may well impact Q4 performance as stocks are unwound.

There is better news from the influential Purchasing Managers Index, which rose to 49.6 in October — up from 48.3. This represents the highest figure since April, but is still below 50, which is the dividing line between growth and contraction.

Printing's fortunes are traditionally closely linked to consumer confidence, so the latest data (October) from retailers is disconcerting. A fall of 0.1% — the weakest performance since April — took commentators by surprise, given that in many shops Christmas promotions began early. Again, Brexit uncertainty lies behind the decline, and also explains the Bank of England's decision to downgrade its growth forecast for 2020 to 1.2% from 1.3%.

## **UK printing industry**

The latest *Printing Outlook* report from the British Printing Industries Federation (BPIF) reveals the state of the UK industry in Q3. Its authors described performance as “lacklustre” and “disappointing”, with neither output nor orders living up to expectations. Particularly unwelcome was the lack of a repeat of the seasonal pre-Christmas boost of previous years.

According to the survey 37% of printers increased output levels in the third quarter of 2019. The remainder were split fairly evenly: 31% held output steady and 32% experienced a decline in output. The resulting balance (the difference between the ups and the downs) was +5, a recovery from the -2 in Q2 but some way short of the Q3 expectation (+19). This is the worst Q3 report for three years, since the aftermath of the shock EU referendum result, and particularly disappointing in comparison to the positive Q3 and Q4 performance levels last year.

Less than one-third (30%) of respondents reported that the volume of domestic orders in Q3 increased, and over a quarter (29%) held orders stable. That left 41% that experienced a decline in orders. The resulting balance (-11) is a slight improvement from Q2 (-13) and some way below the Q3 forecast of -4. As feared last quarter, this becomes the first incidence of consecutively contracting quarters in order balances for over seven years.

Looking into Q4, printers are expecting a marginal improvement in their activity levels. Output growth is forecast to increase for just over one-quarter (26%) of companies. Exactly half of respondents predict that they will be able to hold output levels steady in Q4, and 24% expect output levels to fall. That leaves a forecasted balance of +2 for the volume of output in Q4 which, whilst still positive, is lower than the Q3 balance and provides a considerably poor comparison with Q4 2018.

As well as Brexit (see below), which emerged as a “top three” concern for 69% of respondents, pricing pressure and unsustainable pricing are other major concerns for UK printers, in particular with reference to competition from online printers.

## **Brexit**

For the second successive quarter survey, the BPIF asked printers what their preference was – no Brexit, Brexit with a deal, or a no-deal Brexit. In a reversal from last quarter, Brexit with a deal topped the poll in October with 46% (up from 36% previously). No Brexit attracted a 44% share of respondents (down from 51% in July), while 10% were content with No Deal (down from 13%). So it seems that the attractiveness of a no-deal Brexit to some has faded slightly but that the willingness to accept a deal has improved. Asked how Brexit was affecting their businesses, printers cited the costs and cashflow strain from building-up stocks of certain supplies, concerns that clients would withhold work or place it elsewhere in Europe, and lack of confidence in making appropriate investment plans to support the future of their businesses.

## **UK industry profile, sector-by-sector**

I am also grateful to the BPIF for the latest statistics on the composition of the UK printing industry, which show how the respective sectors contribute to the total £14bn turnover:

- Advertising literature — 29%
- Newspapers/magazines/books — 23%
- Packaging/labelling — 19%
- Printing onto materials other than paper (ceramics, textiles, plastics, vehicle graphics, glass, etc) — 14%
- Security — 5%
- Other products — 10%

Among UK manufacturing industries, printing ranks third in terms of gross value added, exceeded only by pharmaceuticals and metal fabrication. The industry also has an excellent record in improving productivity, according to the latest figures from the Office of National Statistics: between 2017 and 2018 output per hour rose by over 5%, compared to well below 1% in the UK economy as a whole.

## **Increase in mergers and acquisition activity**

The annual *PrintWeek* survey of the Top 500 UK printing businesses reveals that the year from March 2018 until March 2019 was the busiest for mergers and acquisition activity in recent years. There were at least 77 deals involving UK companies, driven in many cases by increasing labour and raw material costs, and the need to reduce excess production capacity. Other factors include the addition of new skills and technologies, and expansion into new markets.

## **Uncertainty at Royal Mail**

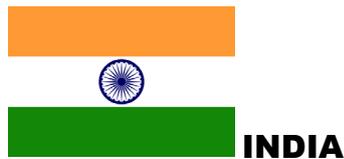
The UK direct mail industry is estimated to be worth around £2bn, and is heavily dependent on the Royal Mail, so news of a possible national postal strike is unwelcome. This became a real prospect in October when the main trade union at the Royal Mail voted in favour of a strike, heightening the possibility of disruption during the all-important period ahead of Christmas. In November the Royal Mail won a court injunction to prevent the strike — a decision that, as I write, the trade union is planning to appeal.

## **Affirming the Power of Print**

One of the most welcome developments in recent years has been the revival of print in marketing circles, encouraged by the realisation that consumers are overwhelmed by the volume — and often underwhelmed by the quality — of purely digital communications.

Picon CEO Bettine Pellant recently attended the 2019 Power of Print seminar, held at Stationers' Hall in London. First held in 2011, Power of Print is established as a “must attend” event for anyone seeking evidence of print’s continuing importance in the communications industry, attracting 200 leaders from the print, paper, publishing, packaging and media industries. A high-calibre, diverse line-up of speakers explores the challenges, innovations and opportunities for print in today’s multi-media world, and 2019 was no exception. Rory Sutherland, head of Ogilvy UK’s behavioural science practice, entitled his presentation “Can we have that in writing?” and argued that “print is more trustworthy than pixels”, while members of Waitrose’s customer relationship marketing team explained why direct mail is so important to the supermarket chain. Bettine also learned that the Harley Davidson Owners Group publishes a quarterly print magazine, entitled — naturally — HOG.

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## News from IPAMA

### **New Governing body of IPAMA:**

The elections of the Governing Council of IPAMA were concluded on 16<sup>th</sup> October 2019. Mr. Dayaker Reddy has been re-elected the President of IPAMA.

### **Participation in Printech, 2019, Dhaka, Bangladesh:**

IPAMA had organised participation in Printech 2019 exhibition which was held at Dhaka, Bangladesh from October 10 to 12, 2019, In this Show, 27 companies had participated under the umbrella of IPAMA. Most of the participants were satisfied with the business results and the orders or serious business enquiries received by them during the exhibition.

### **Financial assistance to IPAMA Members for participation in International exhibitions:**

IPAMA has been providing financial assistance to its Members for participation in foreign exhibitions/conferences etc. Keeping in view the interests of the Members, IPAMA has increased the financial assistance for reimbursement of airfare and space charges. This new initiative taken by IPAMA will encourage more Micro Small and Medium Entrepreneurs (MSME) Members of IPAMA to participate in foreign exhibitions. During participation in foreign exhibitions, they will also be in a position to acquaint themselves about the latest technology available in the international market which is more suitable for MSME Units in India, who are engaged in manufacturing printing, packaging and allied machinery for domestic consumption as also for exports to different countries.

## **Participation of IPAMA Members in 26<sup>th</sup> Iran Print & Pack 2019 Exhibition:**

IPAMA will be participating in 26<sup>th</sup> edition of Iran Print & Pack 2019 exhibition, which is scheduled to be held at Tehran International Permanent Fair Ground, Tehran, Iran from November 29<sup>th</sup> to 2<sup>nd</sup> December 2019. Five companies have already given their consent for participation. Few more companies are also in the pipeline.

## **Participation in Nepal 5P International Expo, 2019:**

IPAMA is contemplating to participate in Nepal 5P International Expo, 2019 which will be organised at Bhrikutimandap Exhibition Hall, Kathmandu from December 20-22, 2019. IPAMA will provide financial to its Members, as per the revised rates for participation in this Show. Some of the IPAMA Members have already shown their interest and are in touch with the Marketing Unit of IPAMA.

## **Regional Comprehensive Economic Partnership (RCEP):**

It is the fact that each country has its own interests and priorities relating to development of business relations with the respective countries. The present conditions of the MSME sector in India, to meet the requirements of international business community, particularly on export promotion, is still at the developing stage. It will take time to come up to compete with the highly developed countries and maintain trade balance. Keeping in view the above position and other related issues, the Indian Government has not accepted the RCEP membership. However, in the coming years, India may consider joining this elite group of RECP countries. Presently India is not in favour of joining this group.

## **PRINTPACK INDIA 2021 International Exhibition:**

IPAMA will be organising the 15<sup>TH</sup> edition of PRINTPACK INDIA exhibition at India Expo Centre, Greater Noida from February 03-08, 2021. Till 31<sup>st</sup> October 2019, 190 exhibitors have booked their space and remitted the requisite space

charges. The space booking process may continue till 31<sup>st</sup> December 2020. The exhibition ground is equipped with all the modern facilities for organising international exhibitions, conferences and other related events. The last edition of PRINTPACK INDIA, which was organised on a gross area of 65,000 square meters in February 2019, had attracted business visitors from 82 countries. The Global Print and Asia Print Members were given special facilities during this Show. The Global Print Members are welcome to participate in PRINTPACK INDIA 2021 exhibition. The relevant information relating to this Show has been uploaded on the website of the Association.



News from ACIMGA

Print4All poised for the next edition: 4-7 May 2021. Save the Date!

With more than 35 thousand visitors and 429 exhibitors in 2018, Print4All is ready to head towards the next edition in 2021, which will be held at Fiera Milano Rho (Italy) from the 4<sup>th</sup> to the 7<sup>th</sup> of May. Print4All is a comprehensive exhibition taking place every 3 years and offering the opportunity to meet the entire supply chain of the processing-packaging-printing industry. Its innovative format aims at going beyond the typical trade exhibition concept: an all-inclusive project focused on the world of printing, overcoming traditional market divisions to deliver an integrated offer that addresses all main areas of application - printing & communication, converting, package printing, labelling and industrial printing.

In addition, Print4All is an integral part of THE INNOVATION ALLIANCE, a market-leading industrial supply chain project. This means that Print4All will be jointly held with 4 more trade fairs dedicated to instrumental goods: Ipack-Ima, Meat-tech, Plast and Intralogistica Italia. This will enable players in

different industrial supply chains to find end-to-end solutions in one place and at one time, from rubber and plastics engineering, food processing technologies, food and non-food packaging to custom graphic printing and product handling and warehousing.

It is not surprising that the satisfaction rate among both visitors and exhibitors at the first edition was well above the average for similar exhibitions. The success of the event is based on the real stars of the show: companies. In order to be one of those stars, you can already take a look at our How To Exhibit page at <http://www.print4all.it/en/content/how-exhibit>

Leading up to the event, next year Acimga (the Italian Manufacturers Association of Machinery for the Graphic, Converting and Paper Industry) in partnership with ARGi (Italian Graphics Supplies Industry Providers) will hold the Print4All Conference at the Fiera Milano Rho exhibition centre (Italy). In view of the 2021 edition, the event opens a window on the future of technologies and markets, in a scenario where the ongoing evolution of digital is driving all industrial areas. We look forward to meeting you at the Conference in 2020 and at the fair in 2021.

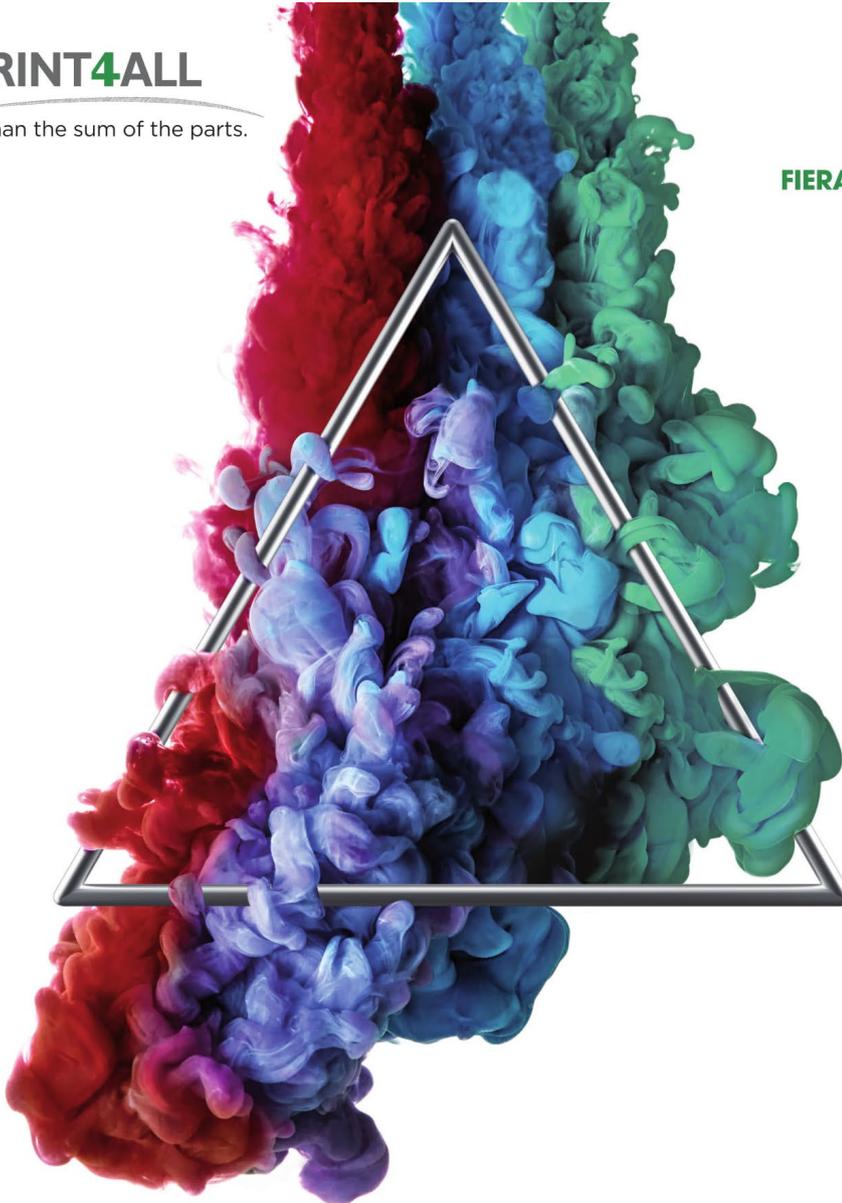
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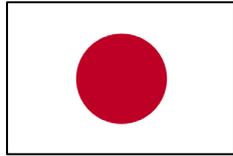
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**JAPAN**

## News from JPMA

### 【Japanese Economy and Printing Market】

- The Japanese manufacturing industry has begun to see moves to postpone plant investment against the backdrop of heightened uncertainty due to political risks including trade friction and sluggish IT-related demand in Japan. In the non-manufacturing industry, demand remains strong for investment for automation and labor-saving against the backdrop of labor shortage. An aggravation in overseas environment, however, has adversely affected the domestic economy, making companies cautious in plant investment.
- In the printing industry, while a sign of recovery, albeit mild, is beginning to be seen, there are a heap of chronic issues including the diversification of information media and the shrinking market due to a decreasing birth rate, an aging population, etc. The business environment thus remains severe.
- On the other hand, the holding of the Tokyo Olympic and Paralympic Games in 2020 and the decision to hold the Osaka-Kansai World Expo in 2025, among others, are expected to contribute to a more vigorous market for printing related industries.
- According to the Current Production Statistics by the Ministry of Economy, Trade and Industry (METI) (covering establishments with 100 or more employees), production values by product in the printing industry during the period from January to June 2019 were 183.8 billion yen in total (0.7 % decrease year on year), 30.1 billion yen for publishing printing (5.4% decrease year on year), 67.4 billion yen for commercial printing (3.9% decrease year on year), 2.5 billion yen for security printing (1.3% decrease year-on-year), 28 billion yen for printing for the office work (1.6% increase year on year), 39.3 billion yen for package printing (9.2% increase year on year), 8.8 billion yen for decorative materials printing (0.5% increase year on year), and 7.7 billion yen for other printing (7.4% decrease year on year).

### 【Printing Machinery Market in Japan】

- In the printing machinery industry in Japan, while commercial printing, publishing, etc. decreased in 2018 due to the impact of a transition to paperless operations, etc. resulting from digitalization in advanced countries including Japan, with cautious attitudes seen in regard to capital investment, capital investment in advanced equipment and packaging equipment remained firm. On the other hand, with regard to overseas markets, the production value increased year on year as export to Asian countries including China was strong.
- In 2019, however, due to general uncertainty in the Japanese economy, among others, the printing machinery industry has been in a severe situation.
- According to the Machinery Statistics by the METI (covering establishments with 30 or more employees), the production value of printing machinery during the period from January to June 2019 was 92.5 billion yen (12.0% decrease year-on-year).
- The breakdown by types of machinery for the period was as follows: 68.4 billion yen for printing machines (17.3% decrease year on year), 3.1 billion yen for plate making machines (21.1%

decrease year on year), 5.9 billion yen for book binding machines (6.0% decrease year on year), and 15.1 billion yen for paper converting machines (24.5% increase year on year).

- According to the Trade Statistics of Japan by the Ministry of Finance, the export value of printing machinery during the period from January to June 2019 was 71.3 billion yen (5.9% decrease year on year) and the import value thereof was 19.2 billion yen (15.2% decrease year on year).

## 【IGAS2022】

- The next IGAS (International Graphic Arts Show) is scheduled to be held in 2022. The specific period and venue of the exhibition are yet to be decided.
- The record of IGAS2018 is as follows.

Period	6 days from July 26 (Thur.) to 31 (Tue.), 2018
Venue	Tokyo Big Sight
Scale of exhibition	319 companies/ 2,702 booths
Visitors	55,863