

# Newsletter

December, 2015



**Jianguo Xu, President of Global Print;  
Chairman, PEIAC, China**

**Dear members:**

The year of 2015 have entered the closing stage. As President of the Federation, I thank you all for your constant support to the works of Global Print!

Over the year of 2015, the world economic growth is in weak environment, all members of Global Print were trying to take positive measures to cope with the challenge. PEIAC compiled technology road map for Chinese printing industry, and successfully held Print China 2015 exhibition. ACIMGA organized Converflex and "Content Transfer Event" during the Expo 2015 in Milan. NPES received award from US government for efforts to expand US exports with Indonesia. PICON has supported initiatives to polish the image of manufacturing and to change people's traditional impression. VDMA will present sample process chains of PRINT 4.0 in cooperation with their member companies during Drupa 2016. Companies in Switzerland's mechanical and electrical engineering industries (MEM industries) acted swiftly and initiated a considerable number of measures to mitigate the impact of the strong franc. IGAS 2015 was also held successfully in Tokyo and will be changed into three year cycle. I believe that these efforts will help to improve the living environment of the global printing industry, and promote the sustainable development of global printing industry.

The year of 2015 is the 30th anniversary of PEIAC. Here, I wish to thank you all for your warm congratulations! And 2016 is coming , I wish you a Merry Christmas! Good luck for the new year!

Jianguo Xu

President of Global Print



**CHINA**

## **News form PEIAC**

As a vital part of China's economy, China's printing industry, offering supporting services to various industries, has been experiencing a period of slow yet steady growth in recent. According to *The Statistics of Annual Examination of Printing Enterprises* released by State Administration of Press, Publication, Radio, Film and Television of the People's Republic of China, as of the year of 2014, the total output value of China's printing industry reached 1,085.75 billion Chinese Yuan (approximately 175.12 billion US Dollar), realising an annual growth of 5.3%. According to the National Bureau of Statistics, in 2014, there are 4,950 printing enterprises whose annual revenue is no less than 20 million Chinese Yuan from their main business operations, approximately 70% amongst all printing industrial enterprises, an increase of 16% compared with the same period of last year; the amount of incomes from those enterprises' main business and operations reached 658 billion, an increase of 26% compared with the same period of last year.

PEIAC celebrates its 30th anniversary this year. Thanks to the support from industry home and abroad, PEIAC has achieved magnificent accomplishments for the development of Chinese industry. PEIAC is grateful for the congratulations sent by overseas associations.

In 2015, PEIAC finished compiling technology development roadmap for Chinese printing industry

On 19th Nov. 2015, PEIAC held general election. Mr. Jianguo Xu was elected as Chairman and Mr. Lijian Wang was elected as General Secretary.



**Mr. Jianguo Xu**  
Chairman  
PEIAC, CHINA



**Mr. Lijian Wang**  
Vice Chairman and General Secretary  
PEIAC, CHINA



## •News from VDMA

**Mechanical Engineers and Machine Manufacturers Eagerly Awaiting drupa 2016**  
Starting on May 31st till June 10th, 2016, Düsseldorf will be the printing world's center. With its motto "Touch the Future," drupa 2016, the world's leading fair for print and crossmedia solutions, sets mechanical engineering up for it. Through its increasingly cross-linked process chains, printing and paper technology opens the door to the printing industry's future. Even today, it is the vanguard of Industry 4.0 – or in this case, PRINT 4.0.

The drupa 2016 will offer its visitors a peak into the future of the printing and media sector. The globally leading fair truly furnishes exhibitors of printing technology a fit occasion with its motto "Touch the Future": they will use those eleven days from May 31st to June 10th to present visitors with new possibilities of cross-linked process chains.

"Our mechanical engineers and machine manufacturers are at the vanguard of Industry 4.0. We ourselves speak of PRINT 4.0," explains Dr. Markus Heering, managing director of the Printing and Paper Association within VDMA. Intelligently cross-linked machines and systems allow for continuous digital workflows, from the pre-product to the end-product. He says that this crosslinking enables

- individualization and personalization of print products
- variable use of different digital and analog information channels within multi-channel publishing
- a finishing of high-value packaging which would make a difference at the point of sale
- a rapidly growing variety of solutions in industrial and functional printing, where press engineering is currently opening up new growth potentials,
- and last but not least, 3D printing, in which digital process chains are conquering the third dimension

### **Presentation of Sample Process Chains**

This cross-linked PRINT 4.0 process world can be experienced at drupa 2016. You will encounter it in six highlight topics as in the "drupa innovation park," in the program of the "drupa cube," and particularly in the exhibitors' booths. "In cooperation with our member companies, we will present sample process chains," announces Heering. In addition, the Additive Manufacturing Association within VDMA will also offer information on technological possibilities and developments within 3D printing. Amongst other things, the Association will contribute to the "touchpoint 3D fab + print" in hall 7A. By now, more than 70 protagonists of machine manufacturing and additive manufacturing as well as industrial users and research institutes have joined the Association.

### **Crosslinking Increases Productivity**

PRINT 4.0 helps modern printers to minimize down time and to increase their

machines' degree of capacity utilization. Quality control accompanies the process directly along the line of sophisticated sensor systems. By now, process network allows for automation even in small batches. While this is still at its very beginning in other sectors, it has become standard practice in the print and media world. Necessary standardization has made good progress – and among other things, this is being furthered under the VDMA umbrella through a digital interface which is manufacturer-independent. This will allow for a seamless process and data chain from preproduction to the finished product.

Digitalization is key to individual print products in small batches. In the future, however, analog technologies will remain the preferred method whenever high-quality, cost-efficient prints in high circulation are needed. “Despite all new developments in digital printing, analog printing remains our sector’s sales guarantee,” emphasizes Heering.

### **The new growth drivers: package printing and industrial printing**

Direct print on flasks and bottles made of glass, on plastic foils, metals, laminates, fittings, and a large variety of substrates is the order of the day. Worldwide, every second tile produced today receives a print with inkjet technologies. The appertaining machines process about one ton of ink each week. Digital technologies are also gaining popularity in large-size textile printing. Machines with hundreds of print heads manage individual patterns and colors with the highest precision. The inkjet market is growing annually by 10 to 15%. In particular, demand for water-soluble and UV curable inks is growing rapidly.

Unpackaged foods spoil quickly. According to estimations, 1.3 billion tons annually go to waste all around the world because they spoil on their way from the field to consumers. Depending on the region, up to 40% of foods at disposal spoil due to a lack of adequate packaging. Thus, preservation in foil-coated cardboard, in plastic foils, cans, or even bottles can be a great contribution towards fighting hunger and preventing illnesses owing to a lack of hygiene.

Yet, packaging is also a communication interface informing clients and patients – and thanks to printed QR codes, it is growingly multimedia-based. Informative, high-end packaging contributes much toward a product experience. Its design shapes a brand’s image. It is not uncommon for packaging to deliver a buyer’s vital incentive at the point of sale. Printing technology is the key. The drupa 2016 will have a special focus on the growing market of packaging.

### **Mechanical engineers looking forward to drupa 2016**

“Today, our mechanical engineers and machine manufacturers are developing solutions for print products that will still be exciting in the future. The drupa 2016 will prove this in an impressive manner,” announces Heering. Anticipation is rising every day when the world’s most important fair for the sector is coming closer.

### **VDMA: Print China – Good Business Despite Curbed Economic Growth**

#### **Healthy demand for German machinery at the Print China Fair in Guangdong**

Guangdong, April 10th, 2015 – Despite a curbed economic growth and declining exports, China remains export market number one for the German printing technology industry. This week, this tension-filled situation is mirrored in the

industry's fair "Print China" taking place in Guangdong. "When compared to four years ago, we see visitor numbers declining strongly. At the same time, demand for German technology is high. Some German exhibitors report new finalized sales on a daily basis," said Dr. Markus Heering, managing director of the trade association Printing and Paper Technology within VDMA, while in Guangdong on Thursday. Amidst about 1000 exhibitors, there are many German exhibitors who have their own booths at the fair. Nine of them exhibit in a joint German booth organized by PrintPromotion GmbH. In the six exhibition days from April 7th to 12th, 2015, the exhibition's organizers expect trade visitors from more than 90 nations.

### **China's boom is cooling down**

Since the Chinese census bureau attested the year 2014 China's lowest economic growth point since 1990, the International Monetary Fund forecasts a growth of only 6.8 percent for 2015. This development of the Chinese market is also visible in German exports. While the exports of printing machines to China had a total value of €473 million in 2013, this was reduced to €367 million in 2014. For paper converting machines exported from Germany to China, export numbers of slightly more than €50 million annually were maintained in 2014.

### **Global Print meeting in Guangdong**

On occasion of "Print China," representatives of the international federation of printing industry members "Global Print" met on April 8th, 2015, to discuss opportunities and ways to realize their industry's joint interests internationally. During the exchange of information of the national associations represented in Global Print, the Printing and Paper Technology Association within VDMA added the subject Industry 4.0 to the discussion. Global Print was founded in 2008. Apart from Germany, federation members of Global Print include trade associations from the USA, China, Japan, India, France, Great Britain, Italy, Spain, and Switzerland. Together, these countries make for approximately about three quarters of the world market for printing technology products.

### **"The Shanghai World of Packaging concept promises success..."**

...states Kai Büntemeyer, Managing Partner of KOLBUS GmbH & Co. KG and Chairman of the Board of the Printing and Paper Technology Association within VDMA.

### **Mr. Büntemeyer, in which way is your company KOLBUS involved in the packaging market?**

**Kai Büntemeyer:** We manufacture machines and systems for the production of packaging made of paper, carton and board. On the one hand, we are active in the field of luxury packaging for spirits, confectionery, jewellery and watches. In this segment, cartons are not printed and enhanced on offset printing machines but laminated with printed paper. Our second pillar in the packaging market is machines for corrugated board, which we have, to date, only manufactured and sold in North and South America. To be more precise: These are rotary die cutters and flexographic printing machines primarily used by our customers to produce carton packaging for fruit. Here, too, we provide stable cartons and elaborate graphics to a somewhat more sophisticated segment.

### **In Asia, the packaging market is growing. How do you assess the chances of**

---

**German machinery and plant manufacturers to participate in this growth?**

**Büntemeyer:** In the whole region, there are very interesting special fields and niches in the high-quality segment for us German manufacturers the volume of which may very well be as big as the German market. I am, however, sceptical whether we as European machinery manufacturers can keep abreast of the local suppliers in mass segments like brown corrugated board. We will have chances when the exports of Asian companies rise and therefore packaging of higher quality is needed.

**How great is the importance you attach to PacPro Asia?**

**Büntemeyer:** We think that the Shanghai World of Packaging concept with its four individual exhibitions is very good. Experience has shown that it is promising to expand the target group of originally pure machinery purchasers to the manufacturers of the packed and filled goods. We know from annually organized exhibitions with a similar orientation, like Interpack in Düsseldorf, that the mixing of various interest groups inspires the discussions. I presume that we will meet many customers at PacPro Asia who also visit international exhibitions. We want to be present in the Asian market, want to get more familiar with the market and the customers. There will be visitors from the whole region. Among the exhibitors are many local machinery manufacturers – that's good for business, and we can present ourselves to new customers.

**What else do you hope to get from the cross-sector cooperation within the VDMA Packaging Forum, in addition to the joint presentation at the exhibition?**

**Büntemeyer:** The joint presentation at this exhibition marks the beginning. Our aim is to establish a closed marketing platform for the packaging sector. I think it's reasonable to bring together the suppliers of printing and paper technology, plastics and rubber machinery as well as food processing and packaging technology who previously acted independently of each other. We can take a common approach to market research and pre-competition research in order to make it easier for the individual company. In addition, we, as companies, can cooperate more closely in order to offer our customers turn-key solutions with modules from different suppliers. For this to work, we need to agree to harmonized interfaces for different machines and systems. The forum and its working groups offer a lot of potential.

**Which interests do you pursue with your involvement in the Packaging Forum within the VDMA?**

**Büntemeyer:** For me, it's important that we present ourselves as the representatives of the interests of the packaging sector and get involved in the public debate on this topic – also in order to de-emotionalise it. It's a matter of not allowing the different types of packaging to be played off against each other and of bringing forward technically correct arguments. This also includes recycling and environmental protection, and, in addition, that packaging helps ensure the hygienic transport and a longer shelf-life of food, which in turn substantially improves the food security in many regions of the world.

**Additive Manufacturing: 3D Printing is Ready for Industrial Use**

Additive manufacturing technologies permeate industrial production more and more.

Mechanical engineers and machine manufacturers, manufacturers of aerospace technology, medical technology companies, energy systems manufacturers, and the automotive industry all rely on this young technology for producing components with completely new design scope directly out of digital construction data (3D printing).

As opposed to traditional manufacturing technologies, additive manufacturing works without tools. Laser systems build components layer by layer out of plastics or powdered metals. In this way, ducts and voids can be integrated into workpieces nearly at will. The number of single parts and thereby assembly effort can be reduced significantly. Most of all, additive manufacturing carries new potential for light weight construction and integration of functions. It is now possible to realize geometries that could not be produced so far, or only with extreme effort. As tool and mold construction are now redundant, production of single parts and small batch series now becomes economical.

### **German mechanical engineers and machine manufacturers recognized potentials early on**

Leading suppliers of industrial 3D printing machines are German, and early on, German mechanical engineers and machine manufacturers as users also began to rely on additive manufacturing. Automation specialists use it to realize light, more compact grippers which are also individually tailored to the products to be gripped. Energy systems manufacturers employ layering technologies for repair and maintenance of turbine blades, or for development of novel, highly complex gas injection nozzles. Manufacturers producing molds for die-casting and injection molding use additive manufacturing to integrate cooling ducts close to the surface in their molds, whereby they achieve more homogenous temperatures in the injection process. Thus, the molded components reach a higher quality.

Already early on, German mechanical engineers and machine manufacturers recognized additive manufacturing's enormous potential. They use the close network of the industrial location Germany to actively shape the young technology's future. To that purpose, the German Mechanical Engineering Industry Association (VDMA) has initiated the open, international Additive Manufacturing Association within VDMA in early 2014. Its goal to further the technology's industrialization through cooperation between machine manufacturers, users, and suppliers, and to quickly transfer stimuli and innovations from research institutes to the market.

So far, there is a coexistence of research, rapid prototyping, and specific industrial use within additive manufacturing. "Until today, the share of manual work in process chains of additive manufacturing is high. The same is true for wastage rates and quality control effort," reports Ulli Klenk (Siemens AG), the Additive Manufacturing Association's chairman of the board. Integratedly planned and prepared automation is absolutely necessary in order to bring the technology towards industrial maturity. Next to this, the Association's members further subjects like standardization, pre-competitive research, and public relations. "The market needs well-founded information on technologies at disposal, suitable fields of application, as well as possibilities and limitations to additive manufacturing," adds Tobias Baur (TRUMPF Laser- und Systemtechnik GmbH), a board member of the Association.

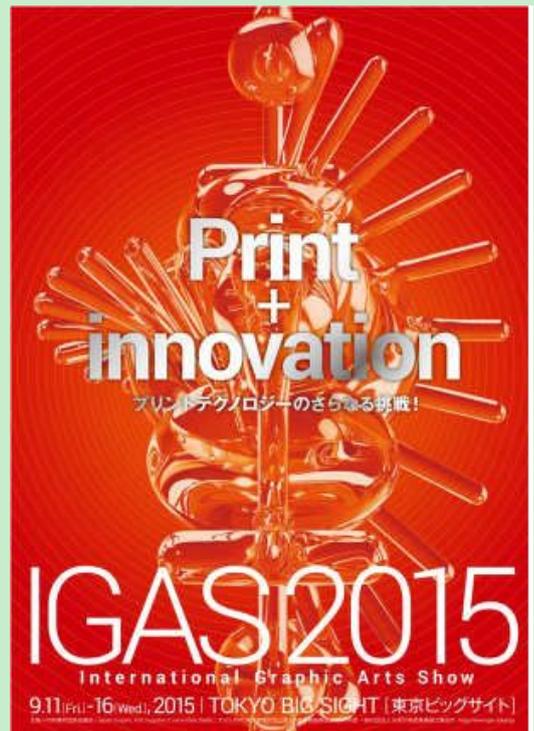


## News from JPMA

### 【 IGAS 2015 】

We would like to report on IGAS 2015 which was held in Tokyo from September 11 to September 16, 2015.

- Under the general theme, “Print +innovation, further challenge to the print technology!” IGAS 2015 introduced various new events which were offered for the first time and created a lively and exciting exhibition.
- At the opening ceremony held on the first day of the exhibition, we had the honor of welcoming many members of related organizations including Mr. Kiyoshi Sawaki, Director of Industrial Machinery Division, Ministry of Economy, Trade and Industry, Mr. Toshiaki Inagi, Chairman of Japan Federation of Printing Industries, Mr. Hiroyuki Shimamura, Chairman of All Japan Federation of Printing Industry Association and also had the honor of the attendance of the Ambassador to Japan from Republic of the Philippines.
- Various events such as +SESSION, +TOUR, +LIVE STUDIO, +FUTURE, and +INTERNATIONAL were held and were very favorably received by the visitors.
- With the weather being fair throughout the exhibition period, the total number of visitors exceeded our initial target of 50,000.
- The next IGAS, IGAS 2018, will be held at the Tokyo Big Sight in July 2018.



- Exhibition Period : September 11 (Friday) ~ September 16 (Wednesday), 2015
- Venue : Tokyo Big Sight
- Number of Exhibitors / Number of unit exhibition space

	IGAS 2015	IGAS 2011
Total number of exhibitors	345	327
(Overseas exhibitors)	49	32
Total number of unit exhibition space	2,688	2740
(Overseas exhibitors)	192	152

● Number of visitors (initial target: 50,000 visitors)

	<b>IGAS 2015</b>	<b>IGAS 2011</b>
Total number of visitors	56,533	73,554
(Visitors from overseas)	5,161	5,825

### < +SESSION>

- Panel discussions and seminars on various themes were held and many visitors attended the sessions.
- In addition to the panel discussions organized by JGASC, the organizer, under the themes of “+Innovation”, “+Future”, “+International”, “+Digital Marketing”, “+CSR”, “Flexo Seminar I & II”, and “Japan Color Seminar”, seminars organized by related organizations such as “International Printing Forum” by Japan Printing Machinery Association, “Asian Symposium on Printing Technology” by The Japan Society for Printing Science and Technology, Tokyo Metropolitan Small and Medium Enterprise Support Center Seminar, and Paper Electronics Research Association Seminar were also held.



### < +TOUR>

- Guided tour programs touring the highlight areas of the exhibition were conducted.
- “Standard Course” introducing the main contents and highlight areas of the exhibition, “Premium Course” giving deeper introduction of cutting-edge technologies and business trends in detail, and “Theme Focus Course” which introduced highlight areas in professional level focusing on various specific themes were conducted. Approximately 2,000 visitors participated and the tours were very favorably received.



### < +LIVE STUDIO>

- The event stage was set up in the area in front of East Hall 2 and various talk shows were held daily, Inviting special guests from diverse fields. We had many participants to these live events and they enjoyed these informative events in a relaxed atmosphere.



### < +FUTURE>

- Booths of exhibitors displaying unconventional and untraditional categories and themes in the fields such as paper electronics, color universal design, flexography, and packaging, and booths of Tokyo Metropolitan Small and Medium Enterprise

Support Center, Japan Federation of Printing Industries, Japan Color, and university laboratories were gathered in this area as a special theme zone.

< + INTERNATIONAL >

- In the International Lounge, dedicated coordinators offered assistance in finding business partners through business matching support service.



Ribbon-cutting  
at the Opening Ceremony



Commemorative photo with  
the honorable Ambassador to Japan,  
Republic of the Philippines



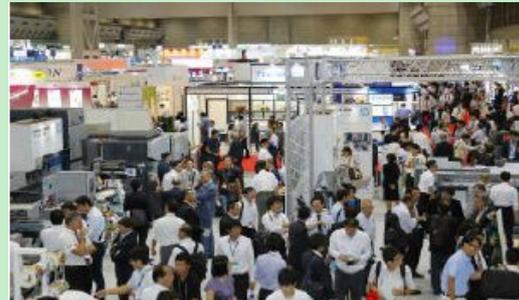
Main Entrance



Multi-lingual Registration Counter



Exhibition Area



Exhibition Area



## News from PICON

### PICONGLOBALPRINT

#### UK MARKET REPORT – OCTOBER 2015

*Bettine Pellant, CEO Picon*

#### UK ECONOMY — OVERVIEW

When Picon last reported to Globalprint — in March 2015 — we noted the economic uncertainty caused by the imminent General Election. It is now six months since the Conservative Party, to almost universal surprise, won an absolute majority, but the uncertain economic outlook remains.

The latest figures from the Office of National Statistics (ONS) reveal that while unemployment (at 5.4%) and inflation (in negative territory at -0.1%) continue to fall, the rate of growth in the economy slowed in Q3 to 0.5% (from 0.7% in Q2). Although the predicted growth for 2015 of 2.3% makes the UK economy one of the fastest-growing in the G7, of particular concern is the 0.3% fall in manufacturing output in Q3 — the third quarter of decline in a row. The reasons are frustratingly familiar — weak demand in overseas markets, especially China and other emerging nations, and the appreciation of sterling.

The ONS picture of a struggling manufacturing sector is backed up by authoritative surveys from the Confederation of British Industry (CBI) and the British Chambers of Commerce (BCC). The contrasting health and resilience of the services sector led the latter to identify a ‘two-tier’ growth pattern in the economy.

#### UK PRINTING INDUSTRY

UK printers were generally optimistic in Q2, the most recent period covered by the British Printing Industries Federation’s *Printing Outlook*. Output levels increased at 41% of respondents (up from 33% in Q1), extending the positive run to over two years, and 43% expected a further increase in Q3.

As for printers’ major concerns, competitors pricing below cost remained the most common worry, followed by the problem of recruiting skilled labour. Third-ranked was under-utilisation of capital equipment.

**Packaging’s strong performance:** The UK packaging sector continues to perform strongly, displaying a high degree of innovation. Not only is packaging “Internet-proof”, it is also a powerful means by which brands can stand out from the

competition, especially at the luxury end of the market. We are seeing growth in paper-based packaging in response to consumer concerns about sustainability. Direct-to-shape (DTS) print, which enables direct printing of irregular-shaped objects, is becoming more common for drinks and beverages, and is starting to appear on personal care products.

Although digital print is an accepted process in labelling, it has so far not penetrated packaging printing. There are signs that this is beginning to change, however, in part due to high-profile campaigns from major brands such as Coca-Cola. Several companies are beginning to back digital with money, and digital presses have recently been installed at two specialist carton printers: Alexir Partnership (a Xerox iGen 4), and Glossop Cartons (a Xeikon 3500).

### **POLISHING THE IMAGE OF MANUFACTURING**

In the UK the printing industry is not alone in suffering from a scarcity of skilled employees. A significant contributing factor is the poor image of manufacturing as a career that has prevailed for many years, and which is partly responsible for the decline in manufacturing's share of UK output from 17% in 1973 to 10% today.

At Picon we have supported initiatives designed to counter this, not least via the PrintIT! "schools-into-industry" scheme, and we therefore welcome the latest pan-industry effort, "Made Here Now". Launched in April, this is the brainchild of Peter Marsh, formerly Manufacturing Editor at the *Financial Times*. By highlighting "the immense store of talent" in British manufacturing, MHN ([www.madeherenow.com](http://www.madeherenow.com)) hopes to "change perceptions and build a better future for the sector."

### **PROMOTING THE POWER OF PRINT**

Despite the growing presence of digital media in our everyday lives, it is clear that predictions of print's demise are wide of the mark. While some companies continue to choose the all-digital route (UK publisher Emap has abandoned print editions altogether) others are returning to print — major fashion retailer Next has re-adopted direct mail. As consumers complain of being overwhelmed by a torrent of digital content — much of it intrusive — marketers are turning to personalised, high-quality print to make their messages heard above the digital "noise".

A sign of this growing interest is the success of the annual "Power of Print" seminar, organised by Two Sides, Print Power, the BPIF and the Stationers' Company. This has quickly become a "must-attend" event on the calendar, shown by the fact that the November seminar sold out early. With a mission to "explore the future of print media in a multi-channel world", the seminar attracted a high-calibre panel of speakers, including Sky's Head of Print Management, Mark Cruise, and Richard Hale of Google, who described the "irresistible combination" of digital and print media.

Thanks to events such as this, more and more printers are realising that print will continue to have a role in the communications industry. While the overall market for print is smaller, print has a physical appeal that digital cannot match.

#### **IPEX TO RETURN TO NEC**

In October Informa Exhibitions announced their plans for Ipex, including significant changes in focus, frequency and venue. The next Ipex will be held in the autumn of 2017. It will return to its previous home of the National Exhibition Centre in Birmingham, and will change from a four-year cycle to a three-year cycle. The exact dates are still being finalised by the Ipex Joint Executive Committee, on which Picon is represented. We will have more details in the next report.



#### **NEW PICON CHAIRMAN**

Lastly, Picon has a new Chairman. In the summer Robert Flather, Managing Director of Kolbus UK, was elected to succeed Bob Usher, Managing Director of Apex Digital Graphics, who had completed his two-year term in the position.

Council member since 2008, when Picon merged with the APMI, Robert's priorities as Chairman will include continuing the work of Bob Usher and the late Peter Morris in helping create an authoritative voice for the printing industry through Picon's membership of the Graphic Print & Media Alliance.



Robert Flather  
Chairman of Picon

Robert started his working life as an engineer in the steel industry before joining Clays in Bungay as General Manager of the bindery. He became Chief Engineer at Jarrolds before joining Kolbus UK in 1997 and becoming Managing Director in 1998. Robert is also a member of The Stationers Company and is Chairman of the Stationers' Foundation.



## News from SWISSMEM

### **Business Conditions of the Swiss Graphic Machinery Industry** **Swiss industries: affected by strong franc**

**In the aftermath of 15 January 2015 (removal of the EUR/CHF floor by the Swiss National Bank), companies in Switzerland's mechanical and electrical engineering industries (MEM industries) acted swiftly and initiated a considerable number of measures to mitigate the impact of the strong franc.**

In the first half year, new orders fell by 14.7% year-on-year. This brought the index of new orders down to its second-lowest level in the last ten years. Sales by the MEM industries dwindled by 7.1% by the end of June 2015 compared with the first half of 2014. Falling sales and orders are affecting large companies and SMEs to a similar degree. The fall in new orders is having an increasing impact on firms' capacity utilization, which has declined almost continuously over the course of the year: in July 2015 it stood at 87.1%, i.e. only just above the long-term average of 86.3%.

### **Graphical Machinery sector exports in the first 3 quarters 2015**

According to figures from the Swiss Customs Administration, exports by the Graphical Machinery industries collectively fell by -7.2% year-on-year from January to September 2015. The total export value was CHF 777 million. The key sales regions showed very mixed developments.

Never the less, exports from Switzerland to the most important market, the EU, remained stable. Only a slight decline of -0.7% is reported in the first three quarter compared to the previous year. The positive export developments to Germany (5.2%) and good results with Spain could not compensate slacking results to countries like France, Belgium and Finland. The business to Italy is unchanged compared to the previous period.

Exports to Asia (-22.4%) and the USA (-13.3%) fell strongly in some regions. Trade to both continents is a fourth of all shipments of graphical machineries and affected the results heavily in this sector.

Looking at individual export segments, the Bookbinding machinery, incl. book-sewing machines grew by 15.6%, whereas Machinery for making up paper pulp, paper or paperboard, incl. cutting machines of all kinds reported a decline of -14.2% the first three quarters compared to last year.

Our Graphical Machinery companies are used to taking action in this situation, and the majority will find solutions – even if not all of these can be realized within Switzerland. In order to strengthen the sector's international competitiveness,

Swissmem and three other associations have come together to launch the "Industry 2025" initiative. Its aim is to facilitate companies' access to the digitization and networking approaches of "Industry 4.0". These approaches harbour enormous potential for productivity and efficiency gains and pave the way for new business models. Last, but not least, Swissmem is pursuing a long-term, vigorous campaign for the retention of the bilateral agreements with the EU. This set of agreements is crucial to the attractiveness and competitiveness of Swiss industry, and is thus indispensable for the industries.

Raoul Keller  
Secretary General  
Graphic Machinery Group, Swissmem  
[r.keller@swissmem.ch](mailto:r.keller@swissmem.ch)

Swissmem unites the Swiss electrical and mechanical engineering industries and associated technology-oriented sectors.



## News from NPES

### For More Information

Contact: Debbie Vieder

Phone: 703/264-7200

E-mail: [dvieder@gasc.org](mailto:dvieder@gasc.org)

### FOR IMMEDIATE RELEASE

October 27, 2015

## NPES RECEIVES U.S. DEPARTMENT OF COMMERCE INTERNATIONAL TRADE ADMINISTRATION AWARD

### Three-year Award Supports Printing, Publishing, and Converting Industry Efforts to Expand U.S. Exports with Indonesia

**Reston, VA** – NPES The Association for Suppliers of Printing, Publishing and Converting Technologies announced today that the International Trade Administration's (ITA) Market Development Cooperator Program (MDCP) awarded the Association a grant to open an international office in Indonesia to facilitate and significantly boost exports by the printing, publishing, and converting industry to Indonesia. Over the next three years, these funds are projected to generate an estimated \$28 million in exports to Indonesia by NPES members across the United States. Indonesia, with the world's fourth largest population and Southeast Asia's largest economy, is a rapidly growing print market attributable to: an expanding, educated middle class; developing macroeconomic conditions; and, regulatory ease of trade for NPES members' products.

U.S. Under Secretary of Commerce for International Trade Stefan M. Selig stated, "With 96 percent of the world's consumers living outside of our borders, exporting is a sure path to growth, prosperity and good-paying jobs." He added, "NPES recognizes the positive impact exporting can have on the bottom line for their member organizations. MDCP awards to groups like NPES are part of President Obama's government-wide strategy to strengthen America's economy by increasing exports."

Each MDCP award winner pledges an investment of at least two-thirds of the project costs and to sustain its project after the initial MDCP award period ends. The funded project will allow NPES to expand U.S. exports by: 1) opening an office in Jakarta; 2) developing programs to help U.S. firms participating in trade shows and trade missions abroad; and, 3) providing technical training and education for the print industry in Indonesia.

Each MDCP award includes financial and technical assistance from ITA to support



well-defined business plans aimed at strengthening an industry by increasing exports. Additionally, MDCP partnerships between ITA and non-profit industry groups help to create U.S. jobs through exports.

NPES President Ralph Nappi said, “We are delighted to receive this MDCP award from the U.S. International Trade Administration. It will support and expand NPES member companies’ international trade efforts in Indonesia, an emerging growth market for the graphic communications industry.” This is the fourth time NPES has received this competitive award. Earlier awards have been used to open successful offices in China and India, as well as a training center in China.

This year, of the 31 applications submitted, only five non-profit industry groups received MDCP awards. In total, these projects are expected to generate more than \$653 million in U.S. exports over the next three years in return for the one-time \$1.4 million Federal investment.

Since the Market Development Cooperator Program’s inception in 1993, ITA has issued 141 awards to 108 organizations in 32 states. The program has helped to generate more than \$9 billion in exports. In an average year, MDCP projects generate \$595 million in U.S. exports.

For complete information about the ITA MDCP award, contact NPES Assistant Director International Trade, Pernilla Jonsson at phone: 703/264-7200 or e-mail: [pjonsson@npes.org](mailto:pjonsson@npes.org).

### **About NPES**

NPES The Association for Suppliers of Printing, Publishing and Converting Technologies is a U.S. trade association representing more than 600 companies nationwide that manufacture and distribute equipment, software and supplies used across the workflow of printing, publishing and converting process. NPES is a partner in the Graphic Arts Show Company that sponsors the global PRINT exhibition and GRAPH EXPO—the largest and most comprehensive prepress, printing, converting and package printing, binding and finishing, mailing and fulfillment, and digital, inkjet, offset, flexo, gravure, and hybrid technologies, products and services trade show and conference in the Americas. NPES offers members a wide range of services including: informational publications; statistical, market research and education programs; government affairs representation; safety and technical standards development coordination in the national and international arenas; and, international trade assistance. For complete information about the Association, its programs, and its member companies, visit: [www.npes.org](http://www.npes.org) or phone: 703/264-7200.



**"Food like internet makes the world talk. Packaging can be the new communication protocol"**

**Suggestions from the ACIMGA event for the Packaging Printing&Converting business community held in EXPO 2015**

"A world of connected food means that packaging is the big promise for a new syntax: packaging is the medium". This is the message launched, from EXPO 2015, by ACIMGA, the Italian Manufacturers Association of machinery for the graphic, converting and paper industry. The Association has played the leader role in the "Content Transfer Event" dedicated to the Package Printing and Converting Business Community, held on October 28, in Milan, in the heart of EXPO 2015, in Cooperation with European House Ambrosetti and ICE, the Italian Foreign Trade Agency.

Several topics were discussed, each part of a huge and interconnected sector, and several speakers (experts of marketing, food producers, brand owners) argued on the endless variations, technical, industrial, economic, cultural and marketing related, that inevitably arise from the world of packaging and industrial machines.

Communication, safety, health, environment, economy: there is no field that is left out from this complex area.

The watchword is: community, team building. The target is to exploit the growth potential that new markets, new consumer habits and favorable government interventions offer to all players.

Carlo Meo, Marketing&Trade, protagonist of the evenings speaking of the new frontiers of packaging: "The B2B market cannot grow if it does not look outside itself and if it does not pay attention to the consumption evolution. The food consumptions in recent years have really exponentially evolved with thousand facets and food has become experience, is not really food, it is no longer nourishment. And this has been the best occasion to let the B2B world understand that the market logics have completely changed and evolved compared to the past".

And packaging, logistics and the way to intend food distributioning the world must be conformed to these logics. "Many of the participants are companies that have always produced packaging, they have always produced in logic of quantity and with low value-added and it is not their fault. Their costumers and distribution asked them carton to simplify and at a very low price - Meo says -. Today packaging is becoming one of the main experiential functions for the customer and for the end consumer. So packaging is growing as a value, then these companies and their customers must evolve and understand that packaging is a product in which to invest also in B2B sector".

"Food makes the world talk - says Carlo Alberto Carnevale Maffé, professor of Strategy at Bocconi University School of Management and chairman of the meeting -. Here, in EXPO 2015, 20 million people have decided that food deserves a good conversation and 7 hours queuing to visit the booth of Japan. We are in a place where food has become conversation syntax in the world. This is a good demonstration that food is a unifying factor for mankind as internet has been in the last 15 years. So, this is a metaphor – professor Carnevale continues -: can food be the new Internet? And if it is so, is packaging the new communication protocol? Is it the new TCP-IP? A world of connected food is the resulting synthesis. Then the offer, which is the perspective I will use, must design this great communication model. Packaging is a medium".

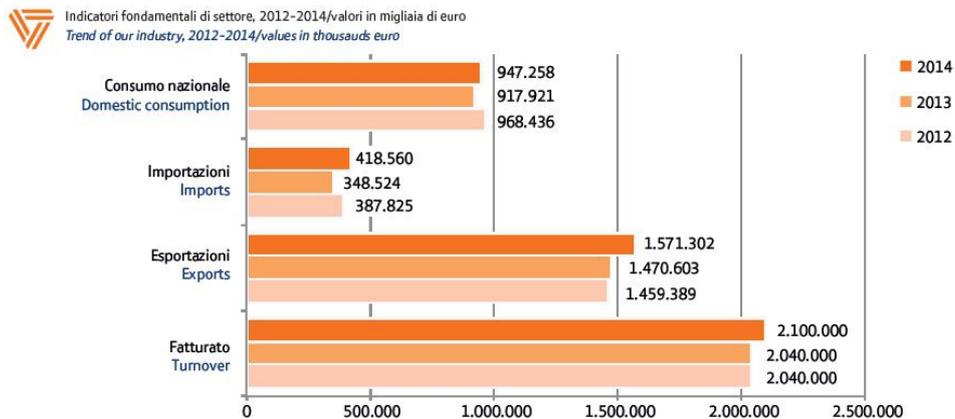


speakers and public



acimga event 28 october 2015

## Extract from Italian trend of industry 2012-2014



Indicatori fondamentali di settore, 2012-2014/valori in migliaia di euro  
Trend of our industry, 2012-2014/values in thousand euro

	2012	2013	2014	% of total	Δ % 14/13
Fatturato/Turnover	2.040.000	2.040.000	2.100.000	0,0	2,9
Esportazioni/Exports	1.459.389	1.470.603	1.571.302	0,8	6,8
Consegne sul mercato interno/Deliveries on the domestic market	580.611	569.397	528.698	-1,9	-7,1
Importazioni/Imports	387.825	348.524	418.560	-10,1	20,1
Consumo/Consumption	968.436	917.921	947.258	-5,2	3,2
Saldo commerciale/Trade Balance	1.071.564	1.122.079	1.152.742	4,7	2,7
Export/Fatturato (%)/Exports/Turnover (%)	71,5	72,1	74,8		
Import-Consumo (%)/Imports-Consumption (%)	40,0	38,0	44,2		
Occupazione (n. addetti)/Employment (n. employees)	6.900	6.900	6.900		

Fonte: Centro Studi ACIMGA su dati ISTAT - Source: ACIMGA Economic Department on ISTAT data