Global Print

Newsletter

March, 2013

CHINA

News from PEIAC

Being the Focus of Global Printing Industry

China Print 2013 International Media Week Starts on 8th January

Sponsored by PEIAC and CIEC, organized by China Print Show Company Ltd (CPSC), the 8th Beijing International Printing Technology exhibition (China Print 2013) will be held on May 14th -18th at New China International Exhibition Center. At present, the sales work has come into an end. More than 1000 companies have participated. The total show space has reached 160,000 sqm, 60% larger than China Print 2009. The estimated visitor entries will reach 180,000, which would be a new record. It will be the largest printing show in Asia and the second largest in the world.

In order to deliver the preparation progress comprehensively to the exhibitors, visitors and media from home and abroad, China Print 2013 organizer holds this international media week. More than 20 overseas media from USA, UK, Germany, Italy, Russia, Korea, UAE, India, Myanmar, Indonesia, Malaysia Philippines, China, Hong Kong, Macau and Taiwan region have been invited to attend this event. It is also our honor to meet the minister counselors of Egypt, Lao, Saudi Arabia embassy as well as the officials of trade promotion organizations here. There are totally 150 attendees including government officials, leaders of local printing and packaging associations, as well as the representatives from the leading exhibitors. Being the focus of the global printing industry, China Print 2013 attracted friends from around the world to gather in Beijing.

The development situation of China's printing industry was introduced by Mr. Zhang Jianmin, secretary general of digital and network printing sub-association. Mr. Lichen, secretary general of China Print Awards made a presentation on the progress of China Print Awards. Mr. Xie Senshu, vice secretary general of PEIAC and general manager of CPSC introduced to the progress of China Print 2013.

During the conference, the leading exhibitors including Heidelberg, HP, manroland, Komori, Konica Minolta, Founder, Shanghai Electric Printing and Packaging Machinery Group, Beiren Group, Masterwork, Cron have shared their exhibition plan on China Print 2013.

On 9th January, the media friends were guided to Tianjin Masterwork to visit factory and then visit the economic development zone to experience the development of China's printing enterprises. Besides, the media friends visited the New China International Exhibition Center to see the facilities of the fair ground. The leaders of local Printing and packaging sub-associations attended a conference held at Radisson Blu Hotel on 9th January.

GERMANY

News from VDMA

VDMA: Print and paper technology defies the crises

Stable development – Chances in new markets – Confidence for 2013

Frankfurt, 4 February 2013 – The German print and paper technology manufacturers performed well in 2012 in a challenging business environment. There was, admittedly, a three percent sales decrease averaged over the total industry. This, however, is exclusively due to the drop in paper technology. Printing machines and paper converting machines posted a sales growth above the average of the total engineering sector. “At present, our industry presents a varied picture because sales in paper technology have plunged. At first glance, this obscures understanding of the fact that printing technology rose by ten percent and paper converting machines went up by seven percent,” said Dr. Markus Heering, Managing Director of the Print and Paper Technology Association at the annual press conference of his association in Frankfurt on Monday.

Orders received went down four percent in 2012. This is also due to the decrease in paper technology. For 2013, the industry expects incoming orders to rise between zero and five percent. All in all, print and paper technology anticipates a continuous development and at least zero growth of sales if the current economic turmoil persists in the current year.

2012 was a “drupa” year. This leading trade fair of the total industry takes place every four years. The German exhibitors were very satisfied with the outcome of the fair. They booked a strong level of incoming orders. Post-fair business, on the other hand, was slightly weaker than expected. Nevertheless, capacity utilisation of the total industry averaged 85.7 percent in 2012 compared to 82.5 percent the year before.

The 44 percent decline in sales of papermaking machines compared to 2011 is due to several reasons: The production of graphic papers decreased, with the result that the investments made by paper manufacturers in new papermaking machines decreased as well. Investments were further hampered by high costs of raw materials and energy. In addition, the trade dispute with China has the undesirable effect that many Chinese paper manufacturers, too, have reduced their investments in new machines. Since May 2011, the EU has imposed punitive duties on coated fine paper from China in protest against unpermitted subsidies for Chinese paper manufacturing plants. As a result, the role of Europe as a sales market for Chinese paper manufactures has shrunk, which has a stifling effect on investments.

Differences in regional developments

In 2012, exports of print and paper technology in these classic sales markets slightly decreased as a result of the Euro crisis. Hardly any orders were received above all from Spain and Italy, but also other EU countries. In North America, the second largest traditional market, printing machines showed a surprising growth of approx. 13 percent. This has, however, not cleared the investment backlog which has persisted above all in the USA for years.
China is still an important market for German print and paper technology. Its development in the three partial segments of this industry was different. Exports of paper converting machines rose by 70 percent, exports of printing machines slightly decreased. In 2011, the share of paper technology exported to China was still approx. 46.1 percent of the German exports of paper technology. In 2012, only 27.1 percent of the total paper technology exports went to China – inter alia, as a result of the punitive duties of the EU.
Africa has developed positively and become a new market. In 2012, exports of paper converting machines increased by 53 percent compared with the previous year. The focus is on West Africa where a 263 percent growth in exports was recorded.

New markets offer growth potential – Quality offensive in India

In contrast to the Western industrialised countries, the print and paper volume in the newly industrialised countries is growing rapidly – above all in China, but also in South America and India. The companies of the print and paper industry are not just waiting for growing demand there, but open up these markets themselves. In 2012, the industry launched a quality offensive in India. This market is huge (800 million readers, 235,000 printing companies, two-digit growth of the book market), but the quality of the printed products is poor. “We want to achieve that quality consciousness for print products is established on this sub-continent with its 1.2 billion people," said Kai Büntemeyer, Chairman of the Print and Paper Technology Association. Better quality is a precondition of the export of Indian print products and the protection of the home market of high-quality imports. The high-tech machines for the production of high-quality print products are offered by the German manufacturers.

Study of the Indian print market

As part of the quality offensive, the Print and Paper Technology Association commissioned a study which shows the actual state of the market. It clearly identifies the poor training of personnel as the most crucial impediment for good print products. This is where the Association comes in by offering three-day training courses above all for teachers of printing training institutions, because they, being multipliers, will pass on what they know to others. In the medium term, it is planned to establish a training centre in India. Such quality offensives shall also be launched in other newly industrialised countries. The next one is Brazil.

No education without books

In public perception, books have been pushed into the background by the triumphal march of tablet PCs and smartphones. Studies show, however, that the use of books has not decreased, neither their use by e-book readers nor by students. For children, the book is definitely even more indispensible. “We do not learn how to read and write at the computer. Learning is only possible with the printed book," said Büntemeyer. Exercise books, too, have a fixed place in school education. Exercise books are still used for learning even in industrial countries. This is demonstrated by the demand for machines for their production. In developing countries, exercise books are, in fact, the key to education. More and more governments now see the value of education and support it. This is a big growth chance for German print and paper technology – above all in Africa. In large parts of this continent, there is a complete lack of books and exercise books.

Print and paper technology is sustainable
Print media and electronic media are believed to be fierce competitors as far as sustainability is concerned. In reality, however, the life cycle assessment of print products is much better if the recycling aspect is taken into account. Old electronic devices can often be found as used products abroad where, especially in the newly industrialised countries, the infra-structure required for the recycling of the valuable raw materials does not exist. Paper recycling, however, is much less complex, and even where there is no recycling at all, these products do not have negative effects on the environment.
For Germany as a highly developed industrial nation, it is not possible to identify an eco-winner per se in a comparison between print media and electronic media. Two research groups separately commissioned by the Print and Paper Technology Association came to the same conclusion. The level of sustainability of media depends on the behaviour of the media user – of the time length and intensity of the use of media, of the selection of the electronic device and the quality of the paper.

New drupa president: Claus Bolza-Schünemann

Claus Bolza-Schünemann is the new President of drupa, the world-wide leading trade fair of the print media industry. On 2 November 2012, the drupa organisation committee unanimously elected the CEO of Koenig & Bauer AG (KBA) for this high-ranking position. “I am delighted to assume the Presidency at such an exciting time. Our sector is developing at a rapid pace and drupa 2016 will represent a key milestone on the path into the future,” said Bolza-Schünemann after his appointment. For 56-year-old Bolza-Schünemann, who became Chairman of the Executive Board in 2011, it will be the first drupa presidency. Bolza-Schünemann took over from Bernhard Schreier, Chairman of the Management Board of Heidelberger Druckmaschinen AG, who had left this group in summer. drupa will continue to be held in Düsseldorf every 4 years. It will, however, be three days shorter and run for only eleven days. “Many exhibitors had spoken out in favour of a shorter length. One point against a change of the cycle is the international trade fair calendar that is built around drupa,” said Dr. Markus Heering, Managing Director of the Printing and Paper Technology Association within the VDMA (German Engineering Federation). The cut of the duration of drupa 2016 to eleven days is a response to the change in the visitor structure. The fair is less and less a public fair; more and more visitors are decision-makers.
The drupa organisation committee is composed of representatives of the entire printing industry – from pre-media and print through to print processing, representatives of packaging production and representatives of media service providers as well as members of the most important industry associations.

Global Print

JAPAN

News from JPMA

JGAS 2013 (Japan Graphic Arts Show 2013) organized by Japan Graphic Arts Suppliers Committee will take place from October 2 to October 5, 2013 for 4 days at the Tokyo Big Sight.

JGAS 2013 is a comprehensive international show on print media with its focus on Asia.
It will be showcasing the latest products, technology, and services related to prepress/pre-media, printing equipment, post press, paper converting equipment, and printing related material and peripheral equipment.

In the previous JGAS which was held in 2009, 252 manufacturers, both domestic and from overseas, participated as exhibitors. Approximately 70,000 visitors came to the show during the 5 day period. We received excellent feedbacks from both the exhibitors and visitors.

- General Theme
  Print + (Print plus something extra) – A new Challenge fort he Print Media!

- Print Summary

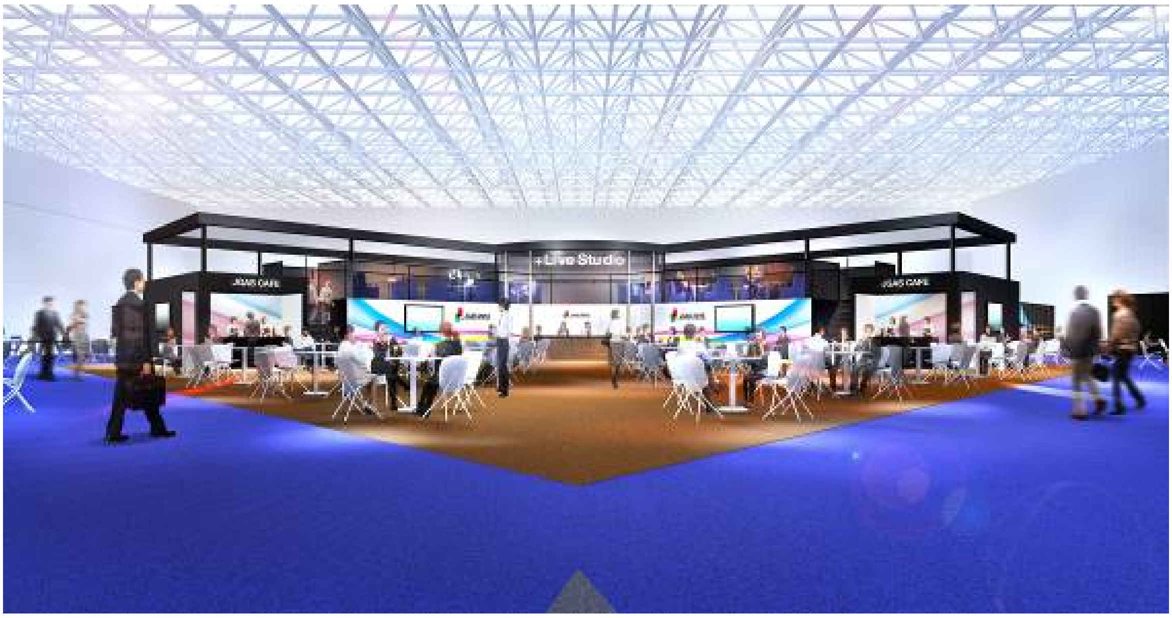
  Session: Special Keynote Speeches, Panel Discussions, Seminars
  A large scale seminar room will be located within the exhibition area where various events such as special keynote speeches, panel discussions, and seminars will be held. Attendance of executives and managers who have authorities regarding purchasing decisions will be promoted.

- Park: Variety of Theme Zones
  New products, cutting-edge technology, and services related to prepress/pre-media, printing equipment, post press, paper converting equipment, and printing related material and peripheral equipment will gather at JGAS2013.

  In order to enable more effective promotion to the visitors, various theme zones where smaller sized exhibitors are gathered will be created. Theme zones such as Flexography, Marketing, Design Creation Software, Total Work Flow, Signs/Displays, and Digital Publishing are scheduled. In addition, a special theme zone focusing in advanced technology exhibiting research and study achievements by universities from around the country is also scheduled.

  Tour: Guided Tours of the Show
  Tours of the exhibition focusing on specific themes will be conducted in connection with highlight seminars. The tours will be excellent opportunities for the exhibitors to promote their products, technologies, and services.

  Live Studio: Promotion Spot for Exhibitors
  A special space for promotional events such as promotional video distribution service, live interviews of the exhibitors will be provided. Business court to be used by exhibitors for promotion and business negotiations will be provided in this area.
  Food court offering a wide range of meals, snacks and refreshments will be available in this area and can be used as a space for relaxation and refreshment for the visitors.



GREAT BRITAIN

News from PICON

The beneficial effects of the London Olympics and the Diamond Jubilee faded quickly in terms of their impact on the UK printing industry. While these two key events kept the country's printers busy, and by all accounts it was impossible to find space on any banner printing device in the weeks leading up to the opening ceremony of the Games, there was no long term uplift to the economy, nor to the printing industry.

Six months later and printers in the UK are still facing difficult times. This is borne out by official figures which show industry sales in the first half of the year above those for 2011 at £5.5 billion (£5.3 billion), but followed by a drop in the third quarter to £2.70 billion (£2.81 billion).

The final quarter of the year as has been busier according to a survey from the BPIF and there is hope that this can be carried into the New Year. But in reality any gain is likely to be due to companies benefitting from the demise of their rivals. Small companies continue to close without comment while there has also been notable failures of larger enterprises. Alderson Group with 200 employees closed in the summer while one of Scotland's largest printers, Montgomery Litho, also with around 200 staff, has closed this year. Also, Benham Goodhead Press was sold to the investment company which owns Polestar, leaving the UK with just two volume web offset groups.
Reorganisation continues across the land and especially in web offset as printers try to reduce capacity to meet falling demand for magazine sections and catalogues.

It is not all doom and gloom as there have been some significant investments. York Mailing, which specialises in the sort of small pagination catalogue that is mailed to consumers to remind them to return to websites where they have previously made a purchase, has ordered a large web offset press and in the smaller end of the magazine sector there have been investments all round. The intention however is not to increase capacity to match growing volumes of business, but to increase efficiency and the ability to handle shorter production runs. One company, with a 16pp web just installed, expected to print runs of 5,000 on it economically.

Investment to improve efficiency is borne out by the BPIF whose survey of printers at the start of 2013 reports that the majority of them are expecting to invest this year but not for extra capacity.

While advertising is predicted to increase this year, by as much as 3% according to some forecasts, digital forms of media continue to gain at the expense of analogue. Internet advertising increased almost 11% last year. Newspaper circulations continue to fall and there is consolidation in terms of production sites while revenues from advertising fell 9.6% last year. Across Europe the closure of up to 10% of newsprint production capacity is indicative of this. Likewise volumes of commercial printing papers are still falling, though the fall at about 5% across Europe is not as steep as in recent years.

There is anecdotal evidence to say that the pendulum swing towards digital communications has reached its limit and marketers understand the value of printed communications once again, though this will not be print in isolation, but print as part of a broader communications campaign taking in all forms of media.

That the change in focus is being recognized across the print indsutry is backed up by the results of a survey carried out for IPEX organizers IIR. Respondents to the survey identified several areas of growth in the market, notably in printed packaging, emerging markets and multi-channel marketing communications. This would seem to chime with the BPIF findings that there is real investment planned, but little increase in capacity. It is the change in focus that is the principal driver, making the print work smarter for marketeers and retailers.

Certainly, the results of the survey have focussed IIR's thoughts on the development of IPEX 2014 which, it says, “will reflect the medium-term future for graphic communications in developed markets as well as emerging markets in the coming years by placing a clear emphasis on digital and cross media technologies, strategies and solutions to effectively promote the power of print media and its integration in the marketing mix.”

Businesses that are leading the way such as Communisis and St Ives (which now describes itself as a marketing services company) are showing that this trans-media trend is real. Smaller printers are aping this move, hoping to make more use of their digital presses. This movement will benefit Ipex 2014 which has been re-positioned as a supply chain show, with a conference running in parallel to catch the movement from offline to online marketing.

Digital print is helping to repatriate work that had been printed overseas by enabling shorter on demand production runs. This is most advanced in book production which is increasingly a digital business. MPG Books has installed a Timson T-Press alongside a Kodak Prosper 1000 for book printing and has decommissioned its large format KBA sheetfed litho machines.

Volumes of printed books in the UK were slightly up in 2012, owing to two factors. The first is that the availability of digital readers, Kindles and the like, is having a beneficial effect on demand for case bound books as having enjoyed reading the book electronically the reader wants a version to put on his or her shelf at home, knowing that the investment will not be wasted. Sales of hardback editions are up. Paperback sales remained static, but due to one unique factor, the Fifty Shades. titles. Without the astonishing success of these (demand took the entire monthly production of one paper mill in Poland!) sales of paperbacks in the UK would have been 15% lower according to Nielsen figures.

The year ended with further impact on the high street as Jessops, HMV and a host of un-mourned businesses, were forced into administration. While this will have an immediate impact on demand for point of sale materials, if sales have moved online, there is hope that this will be a net gain for print as direct mail, catalogues and such will be needed to persuade the UK public to visit these shops via the web if not the high street.

 SPAIN

News from Graphispack

Asociación Graphispack together with Fira de Barcelona is preparing the next graphispag.digital 2013 Exhibition which will be held in Barcelona from April 17th to 20th (Gran Via Exhibition Centre). The main sectors represented in the exhibition will be: prepress, digital printing, machinery and equipment for screen-printing, pad-printing and other printing systems, machinery and equipment for finishing and handling, equipment and systems for digital publishing and communications, printing materials and supports inks and consumables, graphic design Software, equipment and accessories, equipment and services for advertising and signage, equipment and materials for photographic services companies and services companies and associations.

During graphispag.digital 2013 the next highly anticipated events will take place:

Image&Print World Congress

Trends, success stories, innovative techniques, groundbreaking ideas, imaging business solutions and printing; these will be the major contributions of the International Image&Print World Congres. The aim of this event is to inspire ideas and emerging businesses based on the re-evolution of graphic and visual communication, sectors affected by technological change, the economic crisis and the obligation to provide a response to new users who demand custom-made graphic products. Around thirty experts from various countries will identify the areas in which printing and imaging have a great growth potential.

The Image&Print World Congress will be divided into seven sessions: Overview Global Printing Industry Full Colour Process Management; Multiple media printing; Social Media: New Business Opportunities; Digital Publishing; How to innovate: Interactive Image and Printing, Web-to-Print; and Shoot and Create.

The list of speakers includes Nick Waite, Head of Market Research at Smithers Pira; David Preskett, European Professional Print Director at Canon; Claudio Marconato, expert in digital imaging; Hugo Rodríguez, Professor of photography techniques; Chris Bondy, from the School of Media Sciences, Rochester Institute of Technology; Raúl Suárez, CEO of Zinio International; Tony Hodgson, Director of Print On Demand Initiative (PODi) in Europe; Javier Rigal, CEO of Service Point; Siegfried Blume, interior designer; Jennifer Mat, President of Web2Print Experts and Michael Jostmeier, Professor of Media Design /CGI Imaging Georg Simon Ohm University, Nuremberg.

Lastly, the Image&Print World Congress will also present the main trends of the global digital printing market, with special focus on Europe. This system will be compared to others, such as offset, flexography and screen printing, in terms of production and costs. The new market niches where digital printing can offer new business opportunities will also be identified.

The Image&Print World Congress is an educational space held in the setting of graphispag.digital and Sonimagfoto&Multimedia aimed at graphic arts and related companies, photographers, photography labs, advertising agencies, graphic and industrial designers, heads of marketing, publishers, among other professionals in sectors that use printing and images in their activity.

Image & Print Corner

This is an open area to new products and services, solutions and synergies between professionals.

For the first time, the show is expanding to its wide range of services to exhibitors and visitors with a space for exchange between supply and demand: a direct instrument without intermediaries for the presentation of the best business solutions and ideas for renovation and synergies with new markets.

Topics will include design, P.O.P., photography, functional printing, greenprinting and digital printing on all kinds of supports, and there will be the support and active participation of companies, associations, guilds and training centres.

Marca Digital Awards

VIII National Competition for Digital Printing, Screen Printing, Pad Printing and Signage.

This year, the traditional Marco de Oro Awards have been renamed the Marca Digital Awards to put a bigger emphasis on digital printing and the opportunities that this technology offers to personalize any product, object or surface.

Held every two years, the awards are organized by Asociación Graphispack and Fira de Barcelona on the occasion of each Graphispag and graphispag.digital trade show and recognize the best digital printing, screen printing, pad printing and signage projects on any support, using any of these techniques either individually or in combination with other printing systems.

Companies and graphic arts schools are invited to submit their projects, which should have been produced in 2011 and 2012. The competition categories are: industrial printing (on different materials and circuit boards); textile printing (interior decoration, fashion, and others); visual communications (advertising posters, P.O.P advertising, exterior advertising and event advertising); labelling and packaging; reproduction of a graphic work (artistic, decorative, photographic); and other printing applications.

The awards ceremony will be held next April at graphispag.digital.

Anuaria Awards

International Awards for Graphic Design.

This is one of the most important events in Spain in the graphic design world. It enjoys the support of companies, the specialist media, associations and professional and designing schools. The awards were first organized in 1994 and almost 350 projects were submitted for the most recent edition and are open to graphic design projects created in Spain and Portugal in 2012 and 2013.

The categories of the competition range from the design of press advertisements to book covers, commercial advertising campaigns, social interest campaigns, posters, leaflets, catalogues, self-promotional work, P.O.P, magazines, newspapers, reports and balance sheets, illustrations, fonts, logos, corporate identity programmes and packaging. Any projects that are not covered by any of these categories are grouped in the miscellaneous section of Anuaria. Furthermore, students in their final design degree year can enter in the Anuaria-Pro category with an end-of-course project.

The verdict of the jury compounded of representatives of collaborating associations will be announced on 18 April 2013 and all the works selected will be shown in the dedicated Image & Print Awards area.

SWITZERLAND

News from SWISSMEM

1. The general economic development in Switzerland
Global economic growth remained weak in 2012. The Euro area continued to face a mild recession, and Japan's economic output fell substantially. The US economy by contrast experienced a moderate upturn. Developments in the emerging economies were mixed. In some countries, the pace of growth barely accelerated at all, while in others – especially China and Brazil – growth improved somewhat thanks to supportive economic policy. Switzerland's real gross domestic product (GDP) grew in the 4th quarter 2012 by 0.2% compared to the 3rd quarter. Positive contributions to growth came primarily from private and public consumption. Gross fixed investments contributed positively but marginally to GDP growth. From the results of the quarterly national accounts, a provisional GDP growth rate over the whole year 2012 of 1.0% at constant prices and of 1.1% at current prices can be derived.

2. MEM industries: Moderate Stimulation of demand
2.1 New orders
The situation of the Swiss mechanical and electrical engineering industries (MEM industries) is showing some signs of recovery, although new orders in 2012 were negative at -3.8% year-on-year. In the last quarter of 2012, incoming orders and sales increased by 9.8% and 6.5% respectively, compared to the same period of the previous year. Companies in the industry also have more positive expectations for 2013 than they did last autumn.
2.2 Slowdown in goods exports
The positive development in incoming orders has not yet had an effect on goods exports. With the exception of precision instruments (+0.8%), the 2012 export figures recorded by the Swiss Directorate General of Customs were lower than those for the previous year in all product areas. Mechanical engineering (-12.3%) and metalworking (-7.8%) exports were affected the most, while the electronics and electrical engineering sectors saw a more moderate downturn (-3.5%). Overall, the MEM industry exported goods to the value of CHF 64.6 billion in 2012. This is 5.8% less than in the previous year.

2.3. Employment
According to the State Secretariat for Economic Affairs (SECO), 148,158 people were registered as unemployed at the end of January 2013. The unemployment rate therefore rose from 3.3% in December 2012 to 3.4% in January 2013. Compared to the same period in the previous year, unemployment increased by 13,841 persons (+10.3%). According to figures published by the Swiss Federal Statistical Office, the MEM industries (including the watch-making industry) employed 338,057 persons at the end of December 2012.
2.4. Printing and Paper Machinery
The situation in the printing and paper machinery sector is more or less in line with the development of the overall MEM industry. In 2012, exports amounted CHF 1'449 million, corresponding to a drop of -5.3% year-on-year. The Asian markets saw an increase of +9.8%, whereas exports to the EU fell by -12%. The USA registered a moderate -1.4%. The dominant trading partner is since ever Germany, with a share of 25% of the exported goods and 31% of the goods imported into Switzerland (year 2012).

3. Continued pressure to adapt
Despite the drop in exports, Swissmem is cautiously optimistic about the industry's situation in view of the latest developments. The signs of stabilization in the EU have, to a degree, taken the pressure off the market situation in recent months. This is also reflected in businesses' expectations. Their outlook for business development in the coming 12 months is more positive than in autumn 2012. At present, 40.1% of surveyed companies expect increases in orders from abroad. Three months ago, only 25.3% of businesses were of this view. In particular, further growth stimuli are anticipated from the Chinese, US and Eastern European markets.
However, the fact is that businesses – particularly SMEs – are under great pressure to adapt in the long term. In the EU, the main market, the outlook is not encouraging in view of the recessionary trends. Global competition continues to intensify, with strong competition from Asia. The Swiss franc, moreover, is still overvalued against the Euro.
Sig / March 2013

Global Print

USA

News from NPES

NPES Market Data Program – Expanded to Collect Global Data on Printing Plates

In 2011, NPES expanded upon its data collection components to include a program on global printing plates. The NPES Market Data Program has been collecting U.S. shipments of printing equipment and graphic arts supplies for over 55 years. This expansion of the program was a welcome addition since it is the first data collection effort to collect global data. For the purposes of this program, printing plates are defined as Conventional [positive & negative] and Digital (CtP) [thermal & silver and photopolymer]. In addition, only unit data is collected in square meters. Finally, data is collected in the following geographic regions: North America, Latin America, Europe, Asia, Africa and Middle East.

Currently, NPES has collected data for 2010 and 2011. From an “historic” standpoint, data is released in half year increments, with a one year delay. *Figure 1* shows a percentage (%) of the market comparison between 2010 and 2011. Overall, unit sales grew only nearly 1% in 2011. Europe continues to have close to half the market for printing plates, despite the fact that unit sales decreased (-4%) in 2011. Unit sales for the Americas (includes North America & Latin America) and Africa remained somewhat steady between 2010 and 2011. Asia and the Middle East had the largest increase in unit sales from 2010 to 2011, 7% respectively.

For more information on the NPES Market Data Program, visit www.npes.org or contact Rekha Ratnam, Assistant Director of Market Data and Research at phone: 703/264-7231 or e-mail: rratnam@npes.org.

***Figure 1*: 2010-2011 Global Printing Plates**
% of market by Overall Geographic Region
(Thousand Square Meters)