Global Print

Newsletter

Kai Büntemeyer, new President of Globalprint

I welcome all members of Globalprint in my new capacity as president.

An exciting year draws to a close as you can read in the contributions published in our Newsletter.
We can look back on a successful drupa – new big tasks and challenges are waiting for us:
Be it environmental sustainability, energy efficiency, print versus Internet, the further training of staff, counterfeits, etc.

Let us take the first step towards the future together with optimism and vigour.

I am looking forward to a fruitful cooperation.

Victor Hugo says:
The future has many names: For the weak, it means the unattainable, for the fearful, it means the unknown, for the courageous, it means opportunity.

Global Print

CHINA
News from PEIAC

1. China Print 2013

Since CHINA PRINT 2013 has launched its promotion campaign, the organizer has received a large number of responses and booth applications. The sales progress is much better than any former CHINA PRINT events. Although there are still 12 months away from the exhibition opening, the 106,000 square meters indoor show space has been fully occupied.

With a good prospect to China's printing market, most exhibitors have expanded their booth size: Heidelberg applied 3500 m², HP applied 3000 m², Bobst applied 1500 m², KBA applied 1100 m², Komori applied 1000 m², Müller Martini applied 1000 m², Canon applied 1000 m², Wilson applied 900 m², Kodak applied 800 m², manroland sheetfed applied 700 m², Dinga applied 600 m², Konica Minolta applied 500 m², Mitsubishi applied 300 m², etc.

By the end of May, CHINA PRINT 2013 has received 66,336 square meters of net booth space application. All 8 halls of NCIEC could no longer satisfy this demand. The organizer is working on a solution to open up additional show space by building temporary halls to satisfy exhibitors' booth demands.

For more info, please browse www.chinaprint.com.cn

2. The 4th China Print Awards (2011-2012)

China Print Awards is organized by Printing and Printing Equipment Industries Association of China, the Hong Kong Printers Association, Taiwan Printing & Machinery, Material Association and Macao Printing Association, to show technological progress of Chinese printing industry, to recommend famous brands at home and abroad, to offer service to Chinese enterprises for broadening overseas market, to make buyers all over the world know more about China's innovative printing design and quality.

Under the support of printing companies, the last three times of China Print Awards have achieved great success. About 1000 items from China mainland, Taiwan region, Hong Kong, Macao and Southeast Asia have entered for the 3rd China Print Awards. There are 1 full-court award, 24 gold medals, 33 silver medals, 50 bronze medals, 89 prizes of excellence. All the items were show on China Presswork 2011. And then the Ceremony of the 3rd China Print Awards was held on April 8, 2011 in Guangdong province.

The 4th China Print Awards has been launched. The deadline of collecting works is the end of February, 2013. We sincerely welcome all Chinese printers all over the world to participate in this event. All the items will be exhibited at China Presswork 2013. The ceremony of the 4th China Print Awards will be held during China Presswork 2013(The 6th China Presswork & Trade Exhibition).

Please contact:
China Print Awards organizing committee
Contact Person：Mr. Wang Zhanjun
Tel/Fax: +86-10-83163293
E-mail: wangzhanjun@chinaprint.org.cn

News from VDMA

German Printing and Paper Technology

Until August 2012, the German printing and paper technology industry recorded a 3 per cent turnover decrease. The incoming orders have declined as well. The data for printing machines are still in the positive range, the growth rates are, however, falling.

The German printing machinery industry is suffering not only from economic problems, but also structural changes in the print market. In many markets, online media give the traditional print media a hard time. In some markets as, for instance, the USA, publication printing has been at rock bottom for years. Nevertheless, our industry hopes for a recovery even there. Seen as a whole, the quantity of printed matter has been on the rise all over the world for years.

The world-wide largest trade fair for print and paper, the drupa from 3 to 16 May 2012, was successful in a difficult business and economic environment and gave the industry important impulses. However, due to the continued uncertainty in the global markets as a result of the Euro and financial crisis, a full-fledged recovery in the printing and paper industries is still some way off.

At present, the capacity utilisation of printing and paper technology is approx. 85 per cent and the order backlog is approx. 5.4 production months. For the current year, the German printing and paper technology industry expects the growth rate to be between zero and five per cent.

drupa 2012: Trendsetting Impulses for the Print Sector

drupa 2012 is sending out key impulses for the worldwide print and media industry. The most important signal: print has potential and the sector is investing heavily in its future. This trend was already visible at the event's half-way point and exhibitors reported the conclusion of numerous deals all over the world. This willingness to invest continued unabated in the second half of the trade fair. Add to this the fact that experts specifically highlight the wealth of innovations and market-oriented solutions for the entire print spectrum.

314,500 experts from more than 130 countries came to drupa in Düsseldorf, 75,500 less than in 2008. This drop does not come as a surprise. In Germany alone the printing industry lost some 3,900 operations with over 61,000 employees between 2000 and 2011. In the USA over the same period more than 7,700 printing operations closed. Against this backdrop it is not surprising that fewer visitors came to drupa 2012. However – and this is the key point – customers now no longer come to drupa as large delegations or on group corporate trips; it is much more top managers who travel to Düsseldorf. drupa is clearly the decision-makers' trade fair and the trade fair for business."

Numerous orders were placed during the fair. Both large printing machinery manufacturers and their suppliers posted orders. The number of enquiries also rose continually over the course of the trade fair which is why many exhibitors are now also looking forward to good post-fair business.

This shows how drupa 2012's is defending its position as the world's most important and largest B2B trade fair in its sector – a fact also illustrated by the results of the visitor survey. drupa visitors come to drupa with specific investment intentions. Nearly 50% of all visitors place specific orders – and most of this right at the trade fair itself. This comes as no surprise as, after all, the proportion of top managers amongst visitors has grown significantly since 2008 (50.8% compared with 44.4% in 2008).

With more than 190,000 foreign visitors the international focus of drupa continues at a very high level. What is striking here is the high number of trade visitors from India which, now reaching some 15,000, ranks as the second largest visitor nation after Germany (123,000 visitors). Following behind these two in the country ranking are: Belgium, France, the Netherlands, Great Britain, the USA, Switzerland and Italy. It is particularly gratifying to see the rising proportion of visitors from South and Central America (8.8% in 2012 compared to 7% in 2008) – and more specifically from Brazil. The press checking in at drupa 2012 is also highly international in nature: the approx. 2,400 journalists come from 75 countries.

The dominating themes at drupa 2012 were automation, packaging printing, digital printing, hybrid technologies, web-to-print applications and environmentally sound printing. For instance, 40% of visitors said they were interested in digital printing machinery and digital printing systems. Also attracting great attention was the future theme printed electronics which was highlighted at drupa in a variety of fields: at the drupa innovation park, drupa cube, in a Highlight Tour and at many stands of drupa exhibitors.

Also producing a positive result was the specialist supporting programme. Over 20% of visitors were interested in the drupa innovation park and drupa cube presented by digi:media. With its over 130 exhibitors in Hall 7.0 the drupa innovation park (dip) was a hub and focal point for innovations in the digital supplies sector and reported a very successful drupa. The innovation park at drupa 2012 is one of the most unique areas because it focuses on new ideas. Many new ideas are not worthy of a huge stand, but they must be presented in some way that people can see and understand them. So the drupa innovation park is an innovative idea in and for itself."

While the focus at the dip was technology, at drupa cube, the trendy congress location in Hall 7A, everything revolved around trends in cross-media, print-based communication. The 13-day German-English congress programme featuring over 80 speakers was specifically aimed at print buyers, marketing decision-makers, advertisers, publishing houses and designers. Over the differently themed days some 1,000 specialists from 55 countries gathered information here on cross-media campaigns, corporate publishing, trends in newspaper, book and magazine production, out-of-home applications, dialogue marketing, packaging, electronic printing and media production.

The next drupa will be held from 2 to 15 June 2016.

digi:media 2013: Positive Feedback from the Market

In its second edition digi:media 2013, trade fair for commercial publishing & digital printing,will take place from 10 to 12 April in Düsseldorf, Germany.

In line with the motto "content meets technology meets business" digi:media is designed as a solutions-oriented congress trade fair for cross-media communication covering all media channels. Regardless of whether the focus is on newspapers, magazine, books, corporate

publishing, marketing, mailing or advertising campaigns the successful triad of content, technology and business are always centre-stage. Correspondingly, digi:media is aimed at creative and advertising agencies, print service providers, copy and letter shops, marketing decision-makers and the publishing sector. The fair is vital as an annual event in order to cater to the rapid changes, innovations and novelties in the sector.

The positive feedback from the industry is reflected in the current level of registrations. Exhibitors registered so far include: apps4print, Esko, FKS, HP, Horizon, Hunkeler, Kinetik, Kolbus, Kollin Mediengesellschaft, Neo7even, Printdata, Ricoh, Scodix, trivet.net and Werk II. A forecast 160 exhibitors or so will feature at digi:media that canvasses not only for classic print service providers but also for print buyers and content creators.

.INDIA
News from IPAMA

Biggie Showcase of South East Asia

IPAMA, an acronym for INDIAN PRINTING PACKAGING AND ALLIED MACHINERY MANUFACTURERS' ASSOCIATION, with its office at Plot No. C-54, Institutional Area, Sector-62, Noida-201307, U.P., India, is organizing biggest Showcase on Graphic Arts industry in South East Asia, PRINTPACK INDIA 2013. The Show is slated from 23rd to 28th February, 2013. The venue, India Expo Centre & Mart, is sprawled over idyllic 58 acres, at Greater Noida, NCR Delhi.

PRINTPACK INDIA is a unique platform for the industry showcasing today, tomorrow's technology and equipment. Going to be the largest one-stop shop for sourcing of Graphic Arts Machinery and Equipment, in South Asian region. The showcase will only be the trade fair in Asia to offer a 360o panoramic view of the Indian as well as Overseas Graphic Arts Industry. The event will not only be a stimulus, but also a growth motor of the industry and shall leave an indelible print on the printing and packaging globally. Shall cater to complete supply for Printing, Packaging and Media.

In PRINTPACK INDIA 2013, major icons of the industry will rub shoulders with smaller players of the domestic and overseas to give live demos of their latest gizmos. The event will not only be a stimulus, but also a growth motor of the industry and shall leave an indelible print on the printing and packaging, globally.

As the developed countries are still passing through the throes of economic recession, India is the only destination for procurement of World Class and cost-effective machines and equipment or for out sourcing of jobs, as plenty of highly skilled and trained labour is available.

So! all members of the World fraternity are most cordially invited to join and mark their presence in PRINTPACK INDIA 2013 and be benefited.

Make sure, YOU are there.

Global Print

TREND OF THE ITALIAN GRAPHIC, PAPER-PROCESSING AND CONVERTING MACHINERY INDUSTRY
WAITING CONVERFLEX AND GRAFITALIA 2013 (from May 7th to 11th 2013)

After the increase in 2011, the Italian industry of graphic, paper and converting machinery reports positive results for the first half 2012 thanks for the positive trend of export (+10% in comparison with the first half 2011).

We can note double digit profits for exports in Asia (+38%) and in non EU area (+32%).

Among export target countries, sales of Italian machinery in China have doubled; thus, China is again the third buyer country of Italian machinery, (about 8% of total export sales).
Germany is in the second position (+15%).
Exports to Russia also show a significant increase (+60%).
Conversely there was a decrease in exports to USA (-5%), however USA remains the largest buyer country of Italian production (12%).

In the first half of 2012 domestic demand was almost unaltered and imports too (+0.3%). Among supplier country, Germany further consolidates its leadership in sales on the Italian market (+25%).

So the industry's trade balance shows a large increase in the first half 2012: +14.3% compared to the same period of previous year.

Converflex and Grafitalia 2013 (from May 7th to 11th 2013)

In the first months of 2013 will take place the next edition of CONVERFLEX and GRAFITALIA 2013.

Promoted by the Italian Associations Acimga (Italian Manufacturers Association of Machinery for the Graphic, Converting and Paper Industry) and Assografici (Italian Printing and Paper Converting Industries Association), Converflex (the exhibition dedicated to Converting, Package Printing and Labelling) and Grafitalia (Graphic Arts, Print Media and Communication) will take place from May 7 to 11 at the FieraMilano fairgrounds.

As always in the past, the two exhibitions will take place at the same dates in order to exploit the synergy existing between the two technological sectors.

The recruitment of Italian and international exhibitors started during last Drupa is now moving at full speed while promotional activities include a comprehensive set of tools going from web to direct marketing, from trade press to road shows.

Any promotional and marketing effort will be done to guarantee full satisfaction to exhibitors and visitors.

Converflex and Grafitalia are organized by Centrexpo spa, leading show organizer specialized in the Graphic Arts, Converting and Package Printing sectors.

CONVERFLEX
CONVERTING • PACKAGE PRINTING • LABELLING

GRAFITALIA
Fieramilano, Rho - Milan - Italy - 7-11 May 2013

JAPAN

News from JPMA

Mr. Iwao Miyakoshi, new Chairman of JPMA

Annual General Meeting of Japan Printing Machinery Association (JPMA) was held on May 24, 2012. With the expiration of term of office, new officers were elected at the meeting and Mr. Iwao Miyakoshi, President of Miyakoshi Printing Machinery Co., Ltd. was appointed as the new Chairman of the Association.
Mr. Yoshiharu Komori, the former Chairman has assumed the position of Supreme Advisor and will continue to engage and participate in the Presidents Meeting of Global Print representing JPMA.

JGAS 2013 - Now Calling for Exhibitors

Japan Graphics Arts Suppliers Committee consisting of Japan Printing Machinery Association and other organizations will be organizing the Japan Graphic Art Show (JGAS 2013) from October 2 to 5, 2013 for 4 days at the Tokyo Big Sight.

The economic situation surrounding Japan still remains very severe because of uncertainty in the global financial markets, strong Yen, and severe situation of the domestic market which have lasted for a long period. Impacts from last year's Great East Japan Earthquake are still to be seen. However, with the increase of demand in the rapidly expanding emerging nations and continued efforts by each business companies, steady promising signs of economic recovery started to be seen.

Amongst such situations surrounding our market, JGAS 2013, the largest event in the printing related industry, will be held. The show will feature a wide variety of cutting-edge equipment and technology and will also provide an opportunity for active business exchanges.

The show will also provide a perfect opportunity to confirm the progress of new products and technologies one year after their introduction at drupa.

The application period for JGAS 2013 is from June 11, 2012 to December 21, 2012. For applications submitted by September 28, 2012 (Friday), an early application discount rate will be applied to the Exhibitor Fee. Total site area is expected to be $42,710\,\mathrm{m}^2$, with total exhibition area expected to be 14,113 m².
Please refer to the following JGAS2013 website for details: http://www.jgas.jp/

GREAT BRITAIN
News from PICON

SIGNS OF GRADUAL EMERGENCE FROM RECESSION

In this report we examine the current flat state of the UK economy and the question of whether the Olympics will contribute to the country's recovery from the double-dip recession we entered in April this year. We also look at developments impacting Ipex 2014 in London and print's role in a national Government campaign to promote British engineering and manufacturing.

Uncertain economic indicators
In April statistics pointed to the UK avoiding a double-dip recession. However, the country entered recession a second time as output in Q1 fell 0.2% after falling 0.3% in Q4 of 2011. Now, some five months later, some surveys suggest an imminent emergence from recession, while others are less bullish, so we are understandably cautious. On the one hand, according to the National Institute of Economic and Social Research, manufacturing output in July jumped 3.2%, the fastest rate since 2002, and the broader measure of industrial output — which includes energy production and mining — rose by 2.9%, faster than at any time since 1987. On the other hand, almost simultaneously the Engineering Employers Federation reported that tough trading conditions saw a sharp decline in UK manufacturing output in Q3. Overall, for the year, economists expect the economy to shrink by 0.2%, due largely to a weak first half of 2012.

As the Olympics finish, there is little concrete evidence that they will deliver the £13.6 billion boost that Prime Minister David Cameron promised. While it is too early to dismiss an 'Olympic Effect', the Governor of the Bank of England is probably right to observe that "the impact on confidence may give the economy a boost, but ultimately the Games cannot alter the underlying situation we face."

An export-led recovery?
In April we reported that export markets were improving for most Picon members, and in July the official statistics backed this up, recording a sharp improvement in the trade gap between the UK and the rest of the world. Exports rose by 5.2% and imports fell by 1.7%. Importantly — and unsurprisingly given the continuing uncertainties in the Eurozone — UK exports outside the EU reached record levels at £13.2 billion, leading the UK economist at BNP Paribas to predict that the UK will emerge from recession in Q3.

However, as with so many indicators at the present time, it will take time for the real export situation to become clear. The Monthly Business Monitor produced by the Engineering and Machinery Alliance (EAMA) — to which many Picon members contribute — has unfortunately not found evidence of strengthening exports, noting continuing poor enquiry levels. In July, however, EAMA reported that the mechanical engineering sector began to see some improvements in order books.

Employment outlook positive
The EAMA Monitor also noted employers' strong desire to recruit more people, and the positive outlook for employment is a trend that is born out in the latest quarterly Manpower Employment Outlook Survey, an influential report that is used as a benchmark by the government and the Bank of England. Only 5% of companies planned to contract their payroll, 82% expected it to be stable, and 5% to increase staffing. UK unemployment fell in July, according to the latest figures from the Office for National Statistics (ONS), although temporary hiring for the Olympics may have been a major factor. As the ONS noted, London accounted for 91,000 of the increase.

Olympic legacy for Ipex and Fespa
Fespa 2012 and Ipex 2014, the next two major international exhibitions to be held in the UK, will also benefit from the Olympics, as the venue for both — the ExCel centre —hosted a number of major events at London 2012 and consequently now enjoys a raised international profile.

Developments with regard to Ipex 2014 have been widely reported. The decisions of HP, Agfa and — most recently — Heidelberg not to exhibit have led to considerable media speculation about the future shape of the international show calendar that has served the graphic arts industry well for decades.

Nonetheless Ipex 2014 is in good shape with Canon, EFI, Epson, Fujifilm, Komori, Konica Minolta, Screen, Xerox and Xeikon just some of the major companies participating. Of the top 33 key exhibitors, 29 have increased space, and 16 major digital exhibitors have increased their space by total of 55%. And equally important is the fact that there are more significant bookings from the top 100 vendors than ever before so early in the Ipex cycle.

As a sign of its commitment to Ipex, organiser Informa is investing £1 million in an international Hosted Buyer Programme to bring key prospects to Ipex. This initiative is a 'first' for the print industry, but is used by Informa successfully in other industries. The programme is expected to target buyers from emerging markets in particular. Informa has also announced that its Global Roadshow programme in 2013 will also take in emerging markets. The countries announced so far include Australia, Belgium/Netherlands, Brazil, China, France, Germany, India, Italy, Japan, South Africa, Sweden, Turkey, UK and USA.

It is also likely that Ipex 2014 will incorporate the 2014 staging of Informa's new Cross Media event. The first Cross Media, held in September, set out to show business how cross-platform campaigns can improve ROI and drew a good attendance with the desired profile: 59% marketers, 28% print professionals, 13% publishers.

'Make It In Great Britain'
Finally, it was satisfying to see two manufacturers serving the printing and packaging industries picked to join the very select roster of UK manufacturing businesses at the 'Make It In Great Britain' exhibition which ran at London's Science Museum during the Olympics. Xaar (manufacturer of industrial inkjet printheads) and Mettler Toledo Safeline X-ray (sophisticated weighing equipment for packaging/filling) joined famous names such as Airbus, Maclaren and BAE Systems. The exhibition showcased the very best of British manufacturing, with the aim of correcting misconceptions of manufacturing, which accounts for 8% of UK employment and over half of export goods. As the UK continues to gradually emerge from recession, businesses like these will have a big role to play.

SWITZERLAND

News from SWISSMEM

Swiss mechanical engineering industries in harsh environment
The Swiss mechanical and electrical engineering industries are confronted with a very difficult environment. Orders fell by double-digit amounts during the first half of 2012, and sales are stagnating at year-back levels. This is also true for the graphic machinery sector where exports fell by 13% already in 2011. The impact of the worldwide economic slowdown has been quite pronounced in the European markets, whereas the emerging markets are enjoying an upward trend. The gloomy economic prospects for the EU, the most important market for this extremely export-oriented industry, together with the over-valued Swiss Franc leave little prospect of substantial recovery in the near future. However, by applying a forward-looking strategy, the Swiss entrepreneurs have always successfully met the challenges facing them. The dominant feeling is one of guarded optimism and expectations of stabilization, though at a very low level, and recovery in the year to come.

![Global Print logo]

Trade Switzerland – Graphic Machinery – Year 2011 versus 2010

Country	Exports		Imports	
	Mio CHF	± %	Mio CHF	± %
Worldwide	1'294.7	-13.3	1'220.9	-9.9
Germany	292.6	-12.2	490.8	-11.3
USA	169.4	9.4	23.1	-32.2
France	74.5	-39.6	51.1	15.8
Italy	64.3	-34.6	35.8	12.5
China	53.2	19.7	126.5	4.2

Trade Switzerland - Graphic Machinery

Mio CHF

☐ Export ☐ Import

2007   2008   2009   2010   2011

HS codes 8443 / 8441 / 8440 /

Exports 2011 - Graphic Machinery - Total CHF 1'295 Mio

Europe 63%
(- 18% vs. 2010)

ROW 4%
(- 23% vs. 2010)

Asia 15%
(- 9% vs. 2010)

Rest-Americas 6%
(- 5% vs. 2010)

USA 13%
(+ 9% vs. 2010)
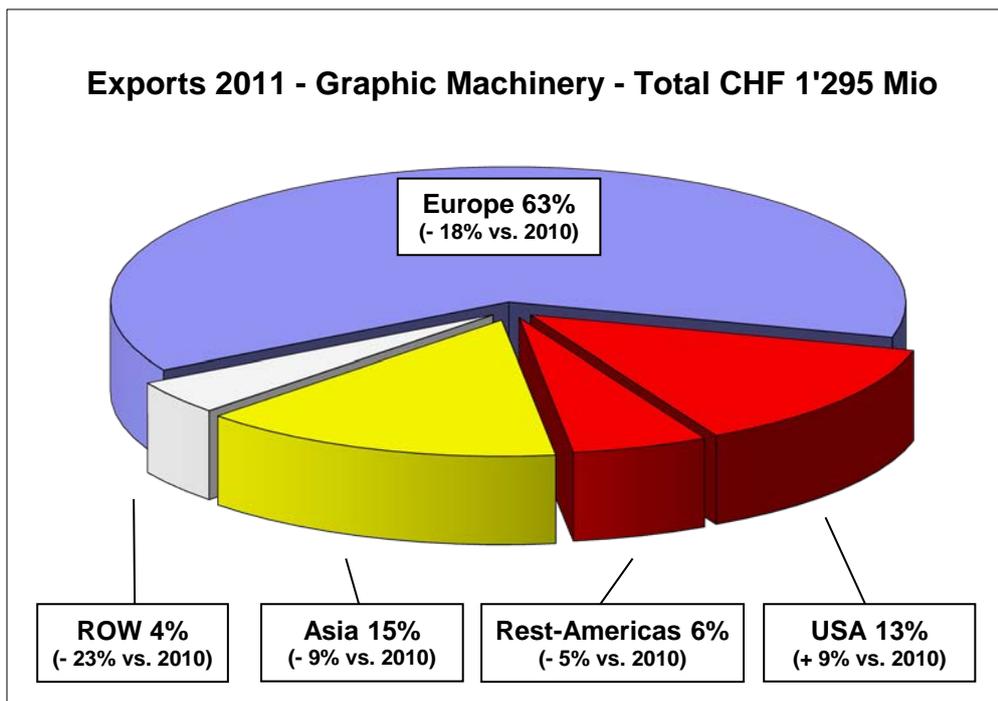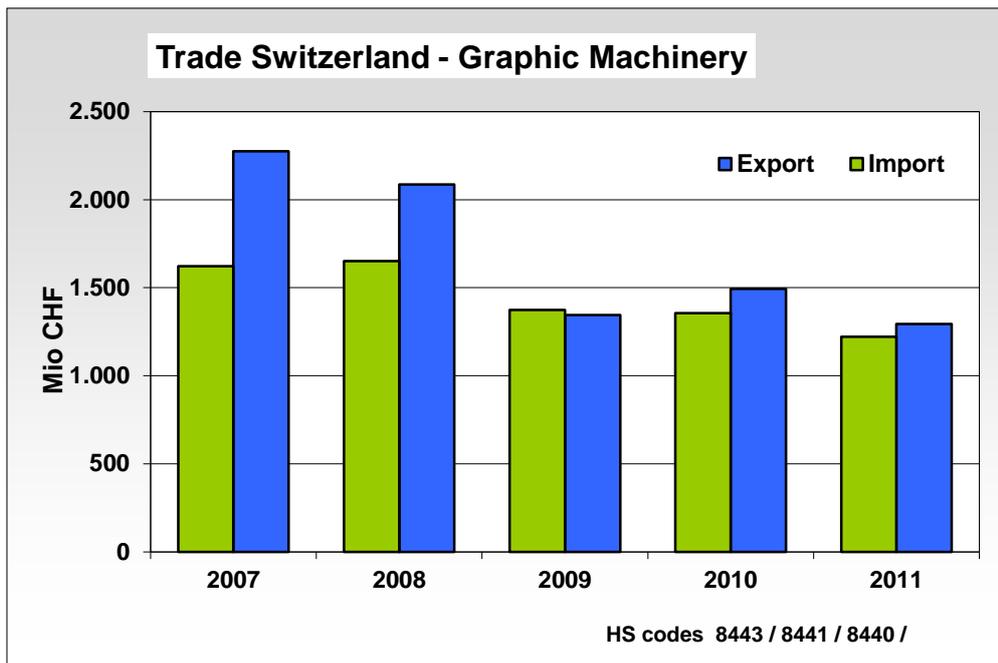
Global Print

 USA

News from NPES

The Global Market for Printing Plates.

As part of a strategic planning initiative at NPES The Association for Suppliers of Printing, Publishing and Converting Technologies, it was agreed that global data on the markets for the various technologies produced by the NPES membership was critical to our members' future success. The first step in that process was the administration and collection of global unit data for printing plates. Printing plates are the key consumable product in the conventional printing process as each job needs one or more plates to enable the transfer of ink to the paper. This program includes data collection for conventional and digital plates. Data is collected in half-year increments and covers the major global manufacturers of plates namely Kodak, Fuji, Agfa, Presstek and IPAGSA. It is estimated that this report represents well over 90% of the total global market. As Figure 1 illustrates, Europe captures the biggest piece of the pie with 41% of the total market, followed by Asia Pacific and America with 31% and 24% respectively. Figure 2 shows the data broken down by major countries of the world and this provides an indication of the relative size of the print market in those countries since over 98% of all pages are still produced by conventional printing methods as opposed to digital printing which does not require a plate. For more information on this program, contact Rekha Ratnam at rratnam@npes.org.

Statistical Data – see appendix

NPES Global Printing Plate Report

PRINTING PLATES WORLDWIDE
Year-End 2010 (Revised)
(Thousand Square Meters)

	Q1	Q2	Q3	Q4	2010 Total
A. World Total					
1. Conventional Plates (CtF)	13,370	13,603	12,245	12,287	51,505
1.1 Positive (incl. waterless, OPC)	8,170	8,501	7,389	7,308	31,368
1.2 Negative (incl. dummy plates)	5,200	5,102	4,856	4,979	20,137
2. Digital Plates (CtP)	99,352	107,758	101,734	110,566	419,410
2.1 Thermal Plates	75,251	82,311	77,337	85,414	312,408
2.1a Conventional	64,280	70,991	66,727	73,010	274,743
2.1b Processless/Chemistry Free	10,971	11,320	10,610	12,404	37,665
2.2 Silver and Photopolymer	24,101	25,447	24,397	25,152	107,002
Grand Total Plates	**112.722**	**121.361**	**113.979**	**122.853**	**470.915**
B. Europe Total					
1. Conventional Plates (CtF)	3,813	3,890	3,418	3,860	14,981
1.1 Positive (incl. waterless, OPC)	2,532	2,659	2,228	2,536	9,955
1.2 Negative (incl. dummy plates)	1,281	1,231	1,190	1,324	5,026
2. Digital Plates (CtP)	43,671	45,850	42,390	46,083	177,994
2.1 Thermal Plates	31,253	33,148	30,319	34,031	125,595
2.1a Conventional	24,915	26,514	24,259	26,638	102,261
2.1b Processless/Chemistry Free	6,338	6,634	6,060	7,393	23,334
2.2 Silver and Photopolymer	12,418	12,702	12,071	12,052	52,399
Grand Total Plates	**47.484**	**49.740**	**45.808**	**49.943**	**192.975**
Ba. West Europe Total					
1. Conventional Plates (CtF)	2,908	2,908	2,628	2,938	11,382
1.1 Positive (incl. waterless, OPC)	1,738	1,758	1,495	1,698	6,689
1.2 Negative (incl. dummy plates)	1,170	1,150	1,133	1,240	4,693
2. Digital Plates (CtP)	37,719	39,442	36,105	38,953	152,219
2.1 Thermal Plates	27,085	28,520	25,823	28,706	107,139
2.1a Conventional	21,045	22,284	20,157	21,717	85,141
2.1b Processless/Chemistry Free	6,040	6,236	5,666	6,989	21,998
2.2 Silver and Photopolymer	10,634	10,922	10,282	10,247	45,080
Grand Total Plates	**40.627**	**42.350**	**38.733**	**41.891**	**163.601**
Ba1. Germany					
1. Conventional Plates (CtF)	1,164	1,072	1,023	1,160	4,419
1.1 Positive (incl. waterless, OPC)	530	470	433	479	1,912
1.2 Negative (incl. dummy plates)	634	602	590	681	2,507
2. Digital Plates (CtP)	8,772	8,869	9,180	9,760	36,581
2.1 Thermal Plates	6,697	6,881	7,086	7,607	27,150
2.1a Conventional	5,211	5,329	*	*	*
2.1b Processless/Chemistry Free	1,486	1,552	*	*	*
2.2 Silver and Photopolymer	2,075	1,988	2,094	2,153	9,431
Grand Total Plates	**9.936**	**9.941**	**10.203**	**10.920**	**41.000**
Ba2. Great Britain (incl. Ireland)					
1. Conventional Plates (CtF)	200	205	174	179	758
1.1 Positive (incl. waterless, OPC)	101	99	79	67	346
1.2 Negative (incl. dummy plates)	99	106	95	112	412
2. Digital Plates (CtP)	6,157	6,358	6,323	6,292	25,130
2.1 Thermal Plates	4,110	4,136	4,192	4,163	16,163
2.1a Conventional	3,028	3,062	3,087	2,991	12,132
2.1b Processless/Chemistry Free	1,082	1,074	1,105	1,172	4,031
2.2 Silver and Photopolymer	2,047	2,222	2,131	2,129	8,967
Grand Total Plates	**6.357**	**6.563**	**6.497**	**6.471**	**25.888**
Ba3. France					
1. Conventional Plates (CtF)	186	203	176	206	771
1.1 Positive (incl. waterless, OPC)	145	138	119	145	547
1.2 Negative (incl. dummy plates)	41	65	57	61	224
2. Digital Plates (CtP)	4,228	4,309	3,896	4,223	16,656
2.1 Thermal Plates	3,135	3,217	2,906	3,190	12,247
2.1a Conventional	2,295	2,416	2,093	2,166	8,944
2.1b Processless/Chemistry Free	840	801	813	1,024	3,303
2.2 Silver and Photopolymer	1,093	1,092	990	1,033	4,409
Grand Total Plates	**4.414**	**4.512**	**4.072**	**4.429**	**17.427**
Ba4. Italy					
1. Conventional Plates (CtF)	417	508	401	478	1,804
1.1 Positive (incl. waterless, OPC)	357	454	325	430	1,566
1.2 Negative (incl. dummy plates)	60	54	76	48	238
2. Digital Plates (CtP)	4,717	5,595	4,300	5,608	20,220
2.1 Thermal Plates	3,835	4,720	3,469	4,871	16,441

2.1a Conventional	3.131	3.890	2.923	3.746	13.690
2.1b Processless/Chemistry Free	704	830	546	1.125	2.751
2.2 Silver and Photopolymer	882	875	831	737	3.779
Grand Total Plates	**5.134**	**6.103**	**4.701**	**6.086**	**22.024**

Ba5. Iberia

1. Conventional Plates (CtF)	383	431	383	434	1.631
1.1 Positive (incl. waterless, OPC)	340	389	340	391	1.460
1.2 Negative (incl. dummy plates)	43	42	43	43	171
2. Digital Plates (CtP)	4.419	4.611	4.063	3.971	17.064
2.1 Thermal Plates	2.984	3.063	2.572	2.719	11.202
2.1a Conventional	2.470	2.453	2.116	2.163	9.202
2.1b Processless/Chemistry Free	514	610	456	556	2.000
2.2 Silver and Photopolymer	1.435	1.548	1.491	1.252	5.862
Grand Total Plates	**4.802**	**5.042**	**4.446**	**4.405**	**18.695**

Ba6. Nordic

1. Conventional Plates (CtF)	146	160	127	147	580
1.1 Positive (incl. waterless, OPC)	34	57	33	33	157
1.2 Negative (incl. dummy plates)	112	103	94	114	423
2. Digital Plates (CtP)	3.293	3.601	3.007	3.324	13.225
2.1 Thermal Plates	1.878	2.025	1.746	1.963	7.521
2.1a Conventional	1.541	1.728	1.453	1.651	6.373
2.1b Processless/Chemistry Free	337	297	293	312	1.148
2.2 Silver and Photopolymer	1.415	1.576	1.261	1.361	5.704
Grand Total Plates	**3.439**	**3.761**	**3.134**	**3.471**	**13.805**

Ba7. Benelux

1. Conventional Plates (CtF)	101	67	59	37	264
1.1 Positive (incl. waterless, OPC)	35	27	22	18	102
1.2 Negative (incl. dummy plates)	66	40	37	19	162
2. Digital Plates (CtP)	3.474	3.475	2.923	3.173	13.045
2.1 Thermal Plates	2.521	2.552	2.098	2.338	9.325
2.1a Conventional	1.962	1.988	1.696	1.764	7.410
2.1b Processless/Chemistry Free	559	564	402	574	1.915
2.2 Silver and Photopolymer	953	923	825	835	3.720
Grand Total Plates	**3.575**	**3.542**	**2.982**	**3.210**	**13.309**

Ba8. Greece

1. Conventional Plates (CtF)	139	77	100	108	424
1.1 Positive (incl. waterless, OPC)	128	68	*	*	*
1.2 Negative (incl. dummy plates)	11	9	*	*	*
2. Digital Plates (CtP)	709	694	616	649	2.668
2.1 Thermal Plates	407	430	371	315	1.288
2.1a Conventional	281	298	*	*	*
2.1b Processless/Chemistry Free	126	132	*	*	*
2.2 Silver and Photopolymer	302	264	245	334	1.380
Grand Total Plates	**848**	**771**	**716**	**757**	**3.092**

Ba9. Switzerland

1. Conventional Plates (CtF)	113	100	97	106	416
1.1 Positive (incl. waterless, OPC)	39	35	28	34	136
1.2 Negative (incl. dummy plates)	74	65	69	72	280
2. Digital Plates (CtP)	903	837	746	787	3.273
2.1 Thermal Plates	751	692	600	664	2.645
2.1a Conventional	513	476	*	*	*
2.1b Processless/Chemistry Free	238	216	*	*	*
2.2 Silver and Photopolymer	152	145	146	123	628
Grand Total Plates	**1.016**	**937**	**843**	**893**	**3.689**

Ba10. Austria

1. Conventional Plates (CtF)	59	85	88	83	315
1.1 Positive (incl. waterless, OPC)	29	21	*	*	*
1.2 Negative (incl. dummy plates)	30	64	*	*	*
2. Digital Plates (CtP)	1.049	1.093	1.051	1.166	4.359
2.1 Thermal Plates	769	804	783	876	3.159
2.1a Conventional	613	644	*	*	*
2.1b Processless/Chemistry Free	156	160	*	*	*
2.2 Silver and Photopolymer	280	289	268	290	1.200
Grand Total Plates	**1.108**	**1.178**	**1.139**	**1.249**	**4.674**

Bb. East Europe Total

1. Conventional Plates (CtF)	905	982	790	922	3.599
1.1 Positive (incl. waterless, OPC)	794	901	733	838	3.266
1.2 Negative (incl. dummy plates)	111	81	57	84	333
2. Digital Plates (CtP)	5.952	6.408	6.285	7.130	25.775
2.1 Thermal Plates	4.168	4.628	4.496	5.325	18.456
2.1a Conventional	3.870	4.230	4.102	4.921	17.120
2.1b Processless/Chemistry Free	298	398	394	404	1.336
2.2 Silver and Photopolymer	1.784	1.780	1.789	1.805	7.319
Grand Total Plates	**6.857**	**7.390**	**7.075**	**8.052**	**29.374**

Bb1. Russia

	Q1	Q2	Q3	Q4	Total
1. Conventional Plates (CtF)	342	358	321	282	1,303
1.1 Positive (incl. waterless, OPC)	340	358	321	281	1,300
1.2 Negative (incl. dummy plates)	2	0	0	1	3
2. Digital Plates (CtP)	1,677	1,543	1,673	1,731	6,624
2.1 Thermal Plates	1,031	996	1,034	1,211	4,272
2.1a Conventional	1,015	979	1,005	1,187	4,186
2.1b Processless/Chemistry Free	16	17	29	24	86
2.2 Silver and Photopolymer	646	547	639	520	2,352
Grand Total Plates	**2,019**	**1,901**	**1,994**	**2,013**	**7,927**

Bb2. Poland

	Q1	Q2	Q3	Q4	Total
1. Conventional Plates (CtF)	99	128	93	134	454
1.1 Positive (incl. waterless, OPC)	88	116	*	*	*
1.2 Negative (incl. dummy plates)	11	12	*	*	*
2. Digital Plates (CtP)	1,706	1,728	1,724	2,235	7,393
2.1 Thermal Plates	1,330	1,372	1,367	1,835	5,837
2.1a Conventional	1,187	1,196	1,205	1,650	5,237
2.1b Processless/Chemistry Free	143	176	162	185	600
2.2 Silver and Photopolymer	376	356	357	400	1,556
Grand Total Plates	**1,805**	**1,856**	**1,817**	**2,369**	**7,847**

Bb3. Rest Of East Europe Total

	Q1	Q2	Q3	Q4	Total
1. Conventional Plates (CtF)	464	496	376	506	1,842
1.1 Positive (incl. waterless, OPC)	366	427	*	*	*
1.2 Negative (incl. dummy plates)	98	69	*	*	*
2. Digital Plates (CtP)	2,589	3,137	2,888	3,164	11,778
2.1 Thermal Plates	1,827	2,260	2,095	2,279	8,367
2.1a Conventional	1,688	2,055	*	*	*
2.1b Processless/Chemistry Free	139	205	*	*	*
2.2 Silver and Photopolymer	762	877	793	885	3,411
Grand Total Plates	**3,053**	**3,633**	**3,264**	**3,670**	**13,620**

C. Middle East Total

	Q1	Q2	Q3	Q4	Total
1. Conventional Plates (CtF)	484	582	545	465	2,076
1.1 Positive (incl. waterless, OPC)	339	472	457	*	*
1.2 Negative (incl. dummy plates)	145	110	88	*	*
2. Digital Plates (CtP)	3,099	3,598	3,489	3,256	13,442
2.1 Thermal Plates	1,734	2,068	1,874	1,912	6,630
2.1a Conventional	1,290	1,523	1,469	1,364	5,644
2.1b Processless/Chemistry Free	444	545	405	548	986
2.2 Silver and Photopolymer	1,365	1,530	1,615	1,344	6,812
Grand Total Plates	**3,583**	**4,180**	**4,034**	**3,721**	**15,518**

C1. Turkey

	Q1	Q2	Q3	Q4	Total
1. Conventional Plates (CtF)	288	367	326	311	1,292
1.1 Positive (incl. waterless, OPC)	183	259	*	*	*
1.2 Negative (incl. dummy plates)	105	108	*	*	*
2. Digital Plates (CtP)	1,084	1,463	1,353	1,351	5,251
2.1 Thermal Plates	498	674	597	650	2,132
2.1a Conventional	353	527	485	512	*
2.1b Processless/Chemistry Free	145	147	112	138	*
2.2 Silver and Photopolymer	586	789	756	701	3,119
Grand Total Plates	**1,372**	**1,830**	**1,679**	**1,662**	**6,543**

C2. Rest Of Middle East

	Q1	Q2	Q3	Q4	Total
1. Conventional Plates (CtF)	196	215	219	154	784
1.1 Positive (incl. waterless, OPC)	156	213	201	*	*
1.2 Negative (incl. dummy plates)	40	2	18	*	*
2. Digital Plates (CtP)	2,015	2,135	2,136	1,905	8,191
2.1 Thermal Plates	1,236	1,394	1,277	1,262	4,498
2.1a Conventional	937	996	984	852	3,767
2.1b Processless/Chemistry Free	299	398	293	410	731
2.2 Silver and Photopolymer	779	741	859	643	3,693
Grand Total Plates	**2,211**	**2,350**	**2,355**	**2,059**	**8,975**

D. Africa Total

	Q1	Q2	Q3	Q4	Total
1. Conventional Plates (CtF)	182	232	128	185	727
1.1 Positive (incl. waterless, OPC)	133	216	*	*	*
1.2 Negative (incl. dummy plates)	49	16	*	*	*
2. Digital Plates (CtP)	1,459	1,393	1,326	1,407	5,585
2.1 Thermal Plates	921	758	840	774	3,288
2.1a Conventional	891	727	*	*	*
2.1b Processless/Chemistry Free	30	31	*	*	*
2.2 Silver and Photopolymer	538	635	486	633	2,297
Grand Total Plates	**1,641**	**1,625**	**1,454**	**1,592**	**6,312**

E. Americas Total

	Q1	Q2	Q3	Q4	Total
1. Conventional Plates (CtF)	2,006	2,314	1,958	1,768	8,046
1.1 Positive (incl. waterless, OPC)	653	779	533	480	2,445
1.2 Negative (incl. dummy plates)	1,353	1,535	1,425	1,288	5,601
2. Digital Plates (CtP)	23,337	27,228	25,941	27,774	104,280

	Q1	Q2	Q3	Q4	Total
2.1 Thermal Plates	18.037	21.000	20.288	21.425	77.266
2.1a Conventional	14.869	17.824	17.034	17.965	67.495
2.1b Processless/Chemistry Free	3.168	3.176	3.254	3.460	9.771
2.2 Silver and Photopolymer	5.300	6.228	5.653	6.349	27.014
Grand Total Plates	**25.343**	**29.542**	**27.899**	**29.542**	**112.326**

Ea. North America Total

	Q1	Q2	Q3	Q4	Total
1. Conventional Plates (CtF)	528	811	660	624	2.623
1.1 Positive (incl. waterless, OPC)	2	3	*	*	*
1.2 Negative (incl. dummy plates)	526	808	*	*	*
2. Digital Plates (CtP)	18.048	21.073	19.481	20.930	79.532
2.1 Thermal Plates	14.692	16.952	15.924	16.885	61.032
2.1a Conventional	11.873	14.233	13.169	14.124	53.202
2.1b Processless/Chemistry Free	2.819	2.719	2.755	2.761	7.830
2.2 Silver and Photopolymer	3.356	4.121	3.557	4.045	18.500
Grand Total Plates	**18.576**	**21.884**	**20.141**	**21.554**	**82.155**

Eb. Latin America Total

	Q1	Q2	Q3	Q4	Total
1. Conventional Plates (CtF)	1.478	1.503	1.298	1.144	5.423
1.1 Positive (incl. waterless, OPC)	651	776	532	479	2.438
1.2 Negative (incl. dummy plates)	827	727	766	665	2.985
2. Digital Plates (CtP)	5.288	6.155	6.460	6.844	24.747
2.1 Thermal Plates	3.345	4.047	4.364	4.540	16.233
2.1a Conventional	2.996	3.591	3.865	3.841	14.293
2.1b Processless/Chemistry Free	349	456	499	699	1.940
2.2 Silver and Photopolymer	1.943	2.108	2.096	2.304	8.514
Grand Total Plates	**6.766**	**7.658**	**7.758**	**7.988**	**30.170**

Eb1. Brazil

	Q1	Q2	Q3	Q4	Total
1. Conventional Plates (CtF)	518	460	396	354	1.728
1.1 Positive (incl. waterless, OPC)	390	340	*	*	*
1.2 Negative (incl. dummy plates)	128	120	*	*	*
2. Digital Plates (CtP)	1.693	2.224	2.533	2.521	8.971
2.1 Thermal Plates	1.288	1.735	*	*	*
2.1a Conventional	1.122	1.531	*	*	*
2.1b Processless/Chemistry Free	166	204	*	*	*
2.2 Silver and Photopolymer	405	489	*	*	*
Grand Total Plates	**2.211**	**2.684**	**2.929**	**2.875**	**10.699**

Eb2. Mexico

	Q1	Q2	Q3	Q4	Total
1. Conventional Plates (CtF)	498	394	446	418	1.756
1.1 Positive (incl. waterless, OPC)	3	4	*	*	*
1.2 Negative (incl. dummy plates)	495	390	*	*	*
2. Digital Plates (CtP)	1.264	1.347	1.428	1.408	5.447
2.1 Thermal Plates	877	923	948	927	3.628
2.1a Conventional	830	874	897	882	3.483
2.1b Processless/Chemistry Free	47	49	51	45	145
2.2 Silver and Photopolymer	387	424	480	481	1.819
Grand Total Plates	**1.762**	**1.741**	**1.874**	**1.826**	**7.203**

Eb3. Rest Of Latin America Total

	Q1	Q2	Q3	Q4	Total
1. Conventional Plates (CtF)	462	649	456	372	1.939
1.1 Positive (incl. waterless, OPC)	258	432	236	202	1.128
1.2 Negative (incl. dummy plates)	204	217	220	170	811
2. Digital Plates (CtP)	2.332	2.584	2.499	2.915	10.330
2.1 Thermal Plates	1.181	1.389	1.385	1.572	5.519
2.1a Conventional	1.044	1.186	1.206	1.297	4.733
2.1b Processless/Chemistry Free	137	203	179	275	786
2.2 Silver and Photopolymer	1.151	1.195	1.114	1.343	4.811
Grand Total Plates	**2.794**	**3.233**	**2.955**	**3.287**	**12.269**

F. ASPAC Total

	Q1	Q2	Q3	Q4	Total
1. Conventional Plates (CtF)	6.885	6.585	6.196	6.009	25.675
1.1 Positive (incl. waterless, OPC)	4.513	4.375	*	*	*
1.2 Negative (incl. dummy plates)	2.372	2.210	*	*	*
2. Digital Plates (CtP)	27.786	29.689	28.588	32.046	118.109
2.1 Thermal Plates	23.306	25.337	24.016	27.272	99.629
2.1a Conventional	22.315	24.403	*	*	*
2.1b Processless/Chemistry Free	991	934	*	*	*
2.2 Silver and Photopolymer	4.480	4.352	4.572	4.774	18.480
Grand Total Plates	**34.671**	**36.274**	**34.784**	**38.055**	**143.784**

F1. China & Hong Kong

	Q1	Q2	Q3	Q4	Total
1. Conventional Plates (CtF)	2.029	2.014	1.997	1.640	7.680
1.1 Positive (incl. waterless, OPC)	1.948	1.938	*	*	*
1.2 Negative (incl. dummy plates)	81	76	*	*	*
2. Digital Plates (CtP)	5.150	5.999	6.629	6.858	24.636
2.1 Thermal Plates	3.653	4.364	4.727	5.105	17.821
2.1a Conventional	3.601	4.302	*	*	*
2.1b Processless/Chemistry Free	52	62	*	*	*
2.2 Silver and Photopolymer	1.497	1.635	1.902	1.753	6.815
Grand Total Plates	**7.179**	**8.013**	**8.626**	**8.498**	**32.316**

F2. Taiwan					
1. Conventional Plates (CtF)	264	310	351	287	1.212
1.1 Positive (incl. waterless, OPC)	132	191	*	*	*
1.2 Negative (incl. dummy plates)	132	119	*	*	*
2. Digital Plates (CtP)	836	1.268	1.058	1.180	4.342
2.1 Thermal Plates	667	1.106	*	*	*
2.1a Conventional	651	1.099	*	*	*
2.1b Processless/Chemistry Free	16	7	*	*	*
2.2 Silver and Photopolymer	169	162	*	*	*
Grand Total Plates	**1.100**	**1.578**	**1.409**	**1.467**	**5.554**

F3. Oceania					
1. Conventional Plates (CtF)	124	116	*	*	*
1.1 Positive (incl. waterless, OPC)	16	16	*	*	*
1.2 Negative (incl. dummy plates)	108	100	*	*	*
2. Digital Plates (CtP)	2.320	2.857	*	*	*
2.1 Thermal Plates	1.421	1.892	*	*	*
2.1a Conventional	1.193	1.654	*	*	*
2.1b Processless/Chemistry Free	228	238	*	*	*
2.2 Silver and Photopolymer	899	965	*	*	*
Grand Total Plates	**2.444**	**2.973**	**2.236**	**2.387**	**10.040**

F4. Japan					
1. Conventional Plates (CtF)	2.492	2.168	1.990	2.021	8.671
1.1 Positive (incl. waterless, OPC)	1.709	1.459	*	*	*
1.2 Negative (incl. dummy plates)	783	709	*	*	*
2. Digital Plates (CtP)	14.523	14.698	14.144	15.903	59.268
2.1 Thermal Plates	14.142	14.352	13.933	15.558	57.856
2.1a Conventional	13.492	13.840	*	*	*
2.1b Processless/Chemistry Free	650	512	*	*	*
2.2 Silver and Photopolymer	381	346	211	345	1.412
Grand Total Plates	**17.015**	**16.866**	**16.134**	**17.924**	**67.939**

F5. ASEAN & Asia Others					
1. Conventional Plates (CtF)	770	700	533	735	2.738
1.1 Positive (incl. waterless, OPC)	364	364	288	462	1.478
1.2 Negative (incl. dummy plates)	406	336	245	273	1.260
2. Digital Plates (CtP)	2.388	2.450	2.153	2.545	9.536
2.1 Thermal Plates	1.635	1.943	1.515	1.985	6.959
2.1a Conventional	1.603	1.840	1.392	1.893	6.728
2.1b Processless/Chemistry Free	32	103	123	92	231
2.2 Silver and Photopolymer	753	507	638	560	2.577
Grand Total Plates	**3.158**	**3.150**	**2.686**	**3.280**	**12.274**

F6. India					
1. Conventional Plates (CtF)	140	194	*	*	*
1.1 Positive (incl. waterless, OPC)	140	194	*	*	*
1.2 Negative (incl. dummy plates)	0	0	0	0	0
2. Digital Plates (CtP)	919	830	*	*	*
2.1 Thermal Plates	529	512	*	*	*
2.1a Conventional	529	512	*	*	*
2.1b Processless/Chemistry Free	0	0	0	0	0
2.2 Silver and Photopolymer	390	318	*	*	*
Grand Total Plates	**1.059**	**1.024**	**1.072**	**1.232**	**4.387**

F7. Korea					
1. Conventional Plates (CtF)	1.066	1.083	980	1.143	4.272
1.1 Positive (incl. waterless, OPC)	204	213	205	250	872
1.2 Negative (incl. dummy plates)	862	870	775	893	3.400
2. Digital Plates (CtP)	1.650	1.587	1.641	2.124	7.002
2.1 Thermal Plates	1.259	1.168	1.257	1.654	5.338
2.1a Conventional	1.246	1.156	*	*	*
2.1b Processless/Chemistry Free	13	12	*	*	*
2.2 Silver and Photopolymer	391	419	384	470	1.664
Grand Total Plates	**2.716**	**2.670**	**2.621**	**3.267**	**11.274**

* Data not shown due to disclosure

Worldwide Printing Plates
1st half 2010
(Thousand Square Meters)

World Total: 234,083
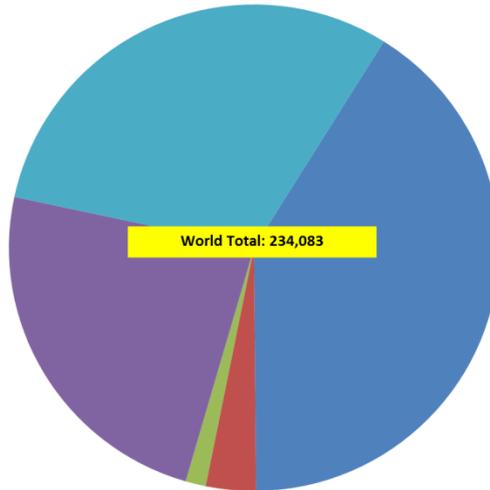
Worldwide Printing Plates
2nd half 2010
(Thousand Square Meters)

ASPAC
72839
31%

Europe
95751
41%

America
57441
24%

Africa
3046
1%

Middle
East
7755
3%

World Total: 236,832
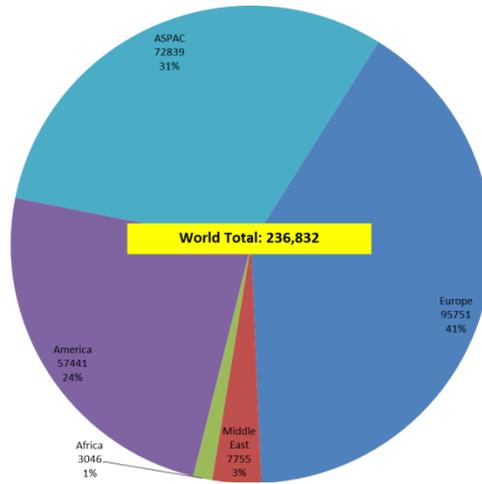
Worldwide Printing Plates
Year-End Total 2010
(Thousand Square Meters)

ASPAC
143784
31%

Europe
192975
41%

America
112326
24%

Africa
6312
1%

Middle
East
15518
3%

World Total: 470,915