



INTERGRAF

THE EUROPEAN
PRINTING INDUSTRY

INTERGRAF



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INTERGRAF

Intergraf, the European Federation for Print and Digital Communication, represents employers in the graphical sector. We actively engage in advocacy efforts, information sharing, networking, impactful campaigns, fostering social dialogue, and participating in EU projects.

Intergraf serves as a unifying platform, bringing together the perspectives of diverse stakeholders to create a cohesive and consolidated representation of the European printing industry. Our overarching goal is to foster the sustained development, innovative advancement, and lasting sustainability of the printing sector and its products.

Print stands as an indispensable cornerstone of people's daily lives, intricately woven into the very fabric of Europe's economic and societal infrastructure. It is hard to imagine a world without books, newspapers, and magazines; a modern society stripped of food packaging, medical leaflets, voting ballots, ID documents, and banknotes; or deprived of an affordable way to share art.

Print bridges the digital divide, a critical necessity in a region as 34% of Europeans have only low or no digital skills (Eurostat 2023).

Moreover, on average 7.5% of European households have no internet access (Eurostat 2023). This gap has persisted for nearly a decade, demanding print's support in ensuring inclusivity and accessibility for all. European Union legislation must consider the role of printed communications, otherwise, fairness will only apply to those online. The digital transition must not affect existing offline rights and freedoms. Consumers who choose physical over online communications are often charged additional fees; many are even forced to go digital without their consent or find it difficult to revert to paper.

The education of the next generation depends on print. Vital literacy skills, as well as critical abilities like concentration, comprehension, retention, and critical thinking, flourish through print. This applies universally, even to the so-called 'digital natives,' making printed materials indispensable alongside digital tools in the realm of education.

Print exemplifies sustainability. Our industry relies mainly on paper, one of the rare truly circular products. It requires no post-purchase electricity, diligently locking carbon throughout its lifetime. It stands as a pinnacle of recycling as Europe is leading the globe in paper recycling initiatives with over 81.5% of European paper and board being recycled.



Print holds the keys to future employment. 600,000 individuals across Europe find meaningful careers in the dynamic realm of printing companies, spanning creative, digital, and technical roles. This thriving industry boasts over 100,000 companies, 95% of which have fewer than 20 employees, with a €80 billion turnover contributing to Europe's economic vitality (Eurostat).

Printing plays a pivotal role in culture & art by enabling artists, designers, and other creative minds to share their work with a broad audience. Moreover, it holds significance as it grants artists and designers the chance to craft tangible products. Importantly, it stands as the supreme method to ensure the preservation and exposure of artworks to forthcoming generations.

The Print industry's innovative spirit shines through with remarkable technological advancements. By embracing personalisation, the integration of digital with print, sustainability, analytics, workflows, and security, the print industry has evolved to meet the needs of today's consumers. Print goes hand in hand with digital technologies creating captivating and immersive experiences that exemplify the impact of printed products.

Security printing holds paramount importance in safeguarding sensitive documents and valuable assets from counterfeiting, forgery, and unauthorized duplication. Currency, identification documents like passports and driver's licenses, IDs, official certificates, and high-value products are all susceptible to fraudulent reproduction. Security printing not only protects the financial interests of governments, organizations, and individuals but also ensures the integrity of legal and official documents.

PRINT

THE SIGNIFICANCE OF PRINT FOR SOCIETY.

Print is everywhere. Print exerts a multi-dimensional influence on our society, economy, culture, education, and environment. At Intergraf, we champion the indispensable role of print, recognizing it not just as a part of our past but as a pivotal force propelling Europe towards a vibrant, inclusive, and sustainable future.

INTERGRAF'S ROLE IN SHAPING THE FUTURE OF PRINT.

ADVOCACY.

Intergraf is recognised by the European Commission as the official spokes-association for the entire graphic industry. This means Intergraf has access to privileged information and is regularly consulted by the European Commission. We defend the competitiveness of our sector and monitor policy initiatives that could impact the printing industry, including trade, fiscal, employment and social affairs.

Print and digital media must be used to their best potential. We defend printed media against unfair statements and stigmatisation, often in comparison with digital media. We work at European level to ensure fair regulatory treatment between print and digital.



Our guidance documents also support our members in the implementation of European legislation at national level and in companies.

SUSTAINABILITY.

Sustainability is a key area of our work. From the sourcing of raw materials, the production process and use of chemicals, to the end-of-life of printed products, our industry is impacted by European legislation. We support the EU ambition for a green transition which should be achieved by securing a workable regulatory framework, in particular for SMEs.

In addition to our advocacy work on sustainability, Intergraf aims to lift the sector's environmental credentials to fight false and misleading statements on the environmental footprint of our products. Intergraf therefore provides a standard for the calculation of the carbon footprint of printing

companies and products and a roadmap to support printers in reducing carbon emissions (Intergraf Recommendations and Roadmap).



To fight greenwashing, Intergraf has set up a method to assess and benchmark environmental labels and schemes (MAES).

MARKET RESEARCH.

Intergraf maintains close ties with research institutions within the printing industry, such as Smithers, which actively engages in the research of emerging technologies and future industry trends. Smithers is a regular contributor to Intergraf publications and events, notably the Intergraf Economic Report.

The Intergraf Economic Report, titled 'The Evolution of the European Graphic Industry,' offers comprehensive statistical data covering the European Union (EU27), the United Kingdom, Norway, Iceland, and Switzerland.

This report encompasses various aspects of the European graphic industry, including turnover, workforce size, company count, production values, and trade statistics. It also highlights the economic progress of sectors relevant to the printing industry, such as ink, paper, publishing, books, press, energy, and postal markets. Historical trends and cross-country comparisons are featured. Notably, the report includes the 'European print market review,' a four-year forecast provided by Smithers, as well as country-specific information and data.



Additionally, Intergraf organises the annual event series 'Shaping the Future of Print.' Smithers contributes market data specific to the focal sub-sector of the printing

industry for each event, encompassing segments like commercial print, packaging, magazines, direct mail, and books.

SOCIAL DIALOGUE.

Intergraf's EU advocacy in the realm of social affairs encompasses a wide range of topics, including employment policy, skills and qualifications, recruitment, health and safety, mobility and work within Europe, rights at work, social protection and inclusion.

Intergraf is the social partner representing employers in the European graphic sector, contributing to social dialogue initiatives to foster ongoing communication between employers and workers.

Established in 2013 with the support of the European Commission, the European sectoral social dialogue committee, jointly formed by Intergraf and UNI Europa Graphical & Packaging, the European trade union representing workers, enhances

cooperation and tackles industry-related subjects. Importantly, it respects the autonomy of national social partners in determining terms and conditions of employment within their respective national contexts.

Joint EU funded projects such as Print Your Future help contribute to the development of the industry's competitiveness.



INSPIRING THE NEXT GENERATION.

To ensure that print remains attractive to future generations, the industry must listen to what young people expect from their working lives and employers. **In alignment with our commitment to a prosperous future for print, each year, the Intergraf Young Talent Award recognizes the most exceptional contributions and ideas from young leaders working in the graphical sector.**

Intergraf often engages in projects that make the print industry more accessible for young people. "Print Your Future" was the

latest European project of Intergraf together with UNI Europa Graphical, focused on bolstering the European graphic industry's skilled workforce. The primary aim was to enhance the printing sector's appeal to young individuals, facilitating their entry and retention by promoting modern, innovative, and people-centred practices.

COMMUNITY & NETWORKING.



Intergraf is committed to bringing together diverse print communities, encompassing packaging, book printing, security printing, and more, not only within the European Union but also globally, thanks to our international events, our members and associate members in the EU, Iceland, Norway, Switzerland, Israel, and the UK.

Intergraf's international presence extends even further with its involvement in the World Print & Communication Forum (WPCF), a global knowledge-sharing platform dedicated to advancing the Printing and Packaging sector on a worldwide scale. Traditionally, the Secretary General of Intergraf serves as a Secretary General of WPCF.

This platform works as a collaborative hub for major transnational and national printing associations from around the world, working collectively to promote the growth and prosperity of the global printing industry.

Since 2015, Intergraf has shared its Secretariat in Brussels with its sister association, FTA Europe, which focuses on representing and promoting flexography printing. Our two associations collaborate closely, driven by their mutual interest in the packaging sector.



CERTIFICATION.

With the Intergraf recommendations on carbon footprint calculation, Intergraf has laid the foundation for an industry-wide methodology to ensure the calculation and reduction of carbon emissions (also included in the annex of ISO 16759). Two industry-specific CO₂ calculators are based on this methodology.

Another field are two standards to promote and protect the interests of the security printing industry by offering ISO 14298 and INTERGRAF 15374 certification to security printers, hologram manufacturers and their suppliers.



MEMBERSHIP POOL: NATIONAL PRINTING ASSOCIATIONS AND ASSOCIATE MEMBERS

Intergraf has a two-tier membership structure. National printing associations, serving as our primary members, represent their country's printing industry. Their collective expertise enriches Intergraf's European initiatives. These primary members, in turn, extend Intergraf's membership to their member companies and organisations. Intergraf has 22 full members from 21 countries.

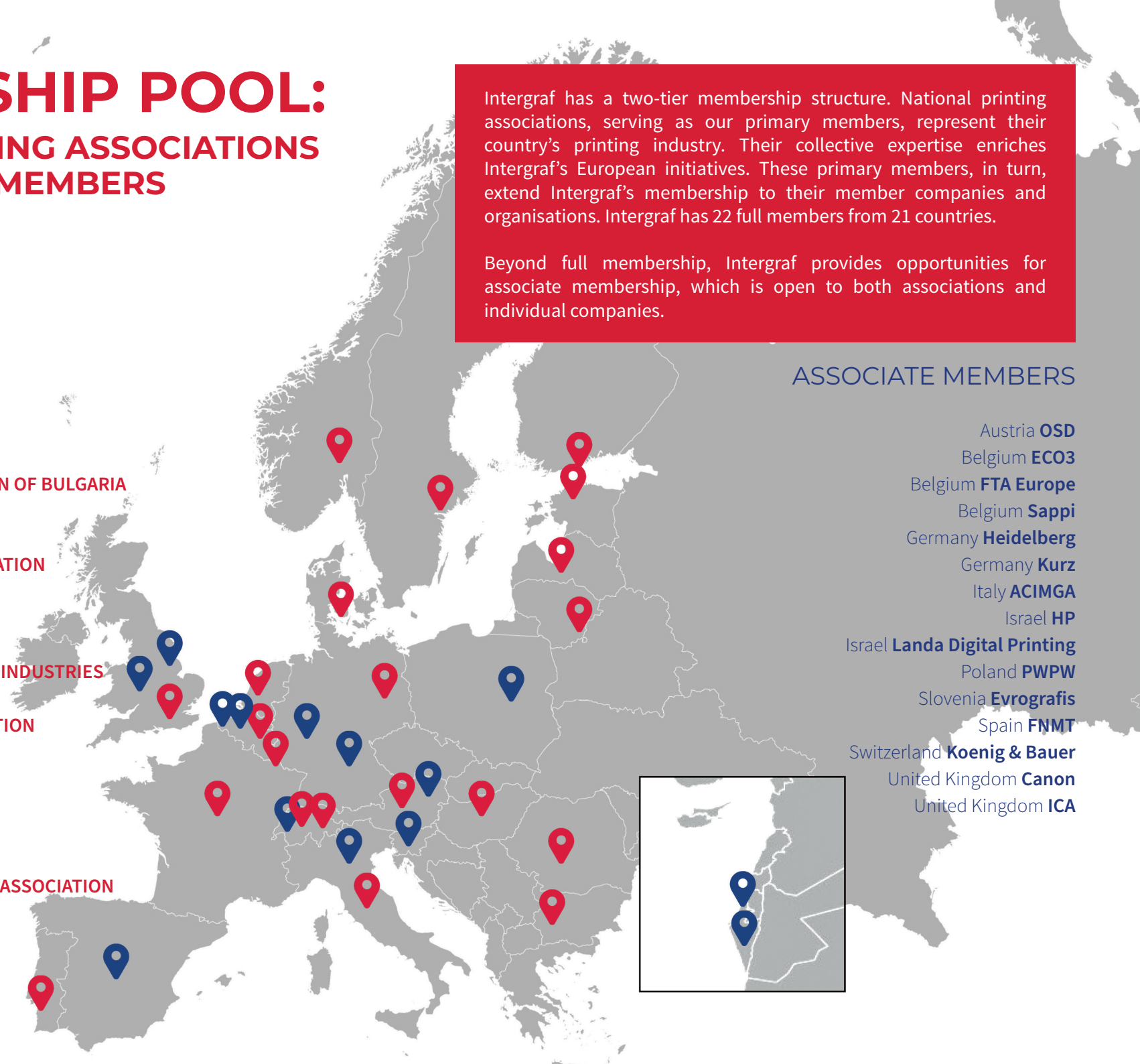
Beyond full membership, Intergraf provides opportunities for associate membership, which is open to both associations and individual companies.

MEMBERS

Austria **PROPAK**
Belgium **FEBELGRA**
Bulgaria **PRINTING INDUSTRY UNION OF BULGARIA**
Denmark **GRAKOM**
Estonia **AEPPI**
Finland **FINNISH PRINTING ASSOCIATION**
France **UNIIC**
Germany **BVDM**
Hungary **FEDPRINT**
Iceland **FEDERATION OF ICELANDIC INDUSTRIES**
Italy **ASSOGRAFICI**
Latvia **LATVIAN PRINTERS ASSOCIATION**
Lithuania **LISPA**
Luxembourg **AMIL**
The Netherlands **KVGO**
Norway **NORSK INDUSTRI**
Portugal **APIGRAF**
Romania **TRANSYLVANIA PRINTERS ASSOCIATION**
Sweden **GRAFISKA FÖRETAGEN**
Switzerland **VISCOM**
Switzerland **VSD**
United Kingdom **BPIF**

ASSOCIATE MEMBERS

Austria **OSD**
Belgium **ECO3**
Belgium **FTA Europe**
Belgium **Sappi**
Germany **Heidelberg**
Germany **Kurz**
Italy **ACIMGA**
Israel **HP**
Israel **Landa Digital Printing**
Poland **PWPW**
Slovenia **Evrografis**
Spain **FNMT**
Switzerland **Koenig & Bauer**
United Kingdom **Canon**
United Kingdom **ICA**



EVENTS & ACTIVITIES.

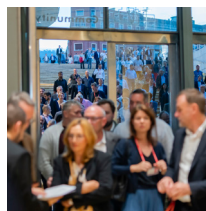
Intergraf hosts a portfolio of events, which have evolved into significant fixtures within the global policymakers and printing industry stakeholders' calendars. These events serve as platforms for discussing pertinent industry issues and fostering invaluable connections.

Print Matters is an annual conference organised by Intergraf which has rapidly grown into a highly anticipated event in the calendars of national printing associations worldwide. With the support of the WPCF (World Print & Communication Forum) every second year, this event brings together printing industry experts from all over the world to discuss the future of print.

Shaping the Future with Print is an event series organised by Intergraf, with the support of our market research partner Smithers. Each event looks into one sub-sector of the printing industry. Most recently, our conferences have focused on Packaging, Books, Commercial Print, Magazines, and Direct Mail. Each Shaping the Future of Print event is accompanied by a Smithers market report.

Intergraf Currency+Identity is a conference and exhibition that connects technological innovators and institutional end users since 1976. The Conference and Exhibition provide excellent opportunities to establish new contacts with leading executives of security printing companies, central banks, and law enforcement from across the world. Distinguished speakers often include policymakers, central bank officials, government authorities, and law enforcement agencies lending their expertise to the discussions. In contrast to the majority of events in the field, Intergraf Currency+Identity has no commercial objective. It is not sponsored. Neutrality and objectivity are guaranteed. The event is open exclusively to security printers, suppliers to security printers, central banks, government authorities, law enforcement and industry-specific digital solution providers.

Additionally, Intergraf facilitates best-practice exchange between its members at our annual General Assembly, Directors' Conference and numerous expert meetings held throughout the year.





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