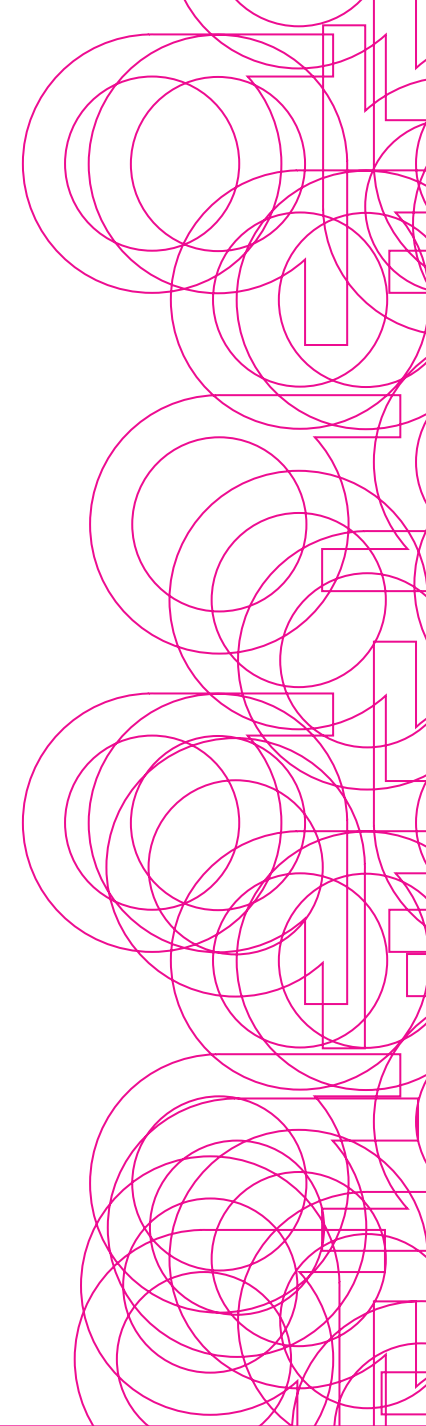


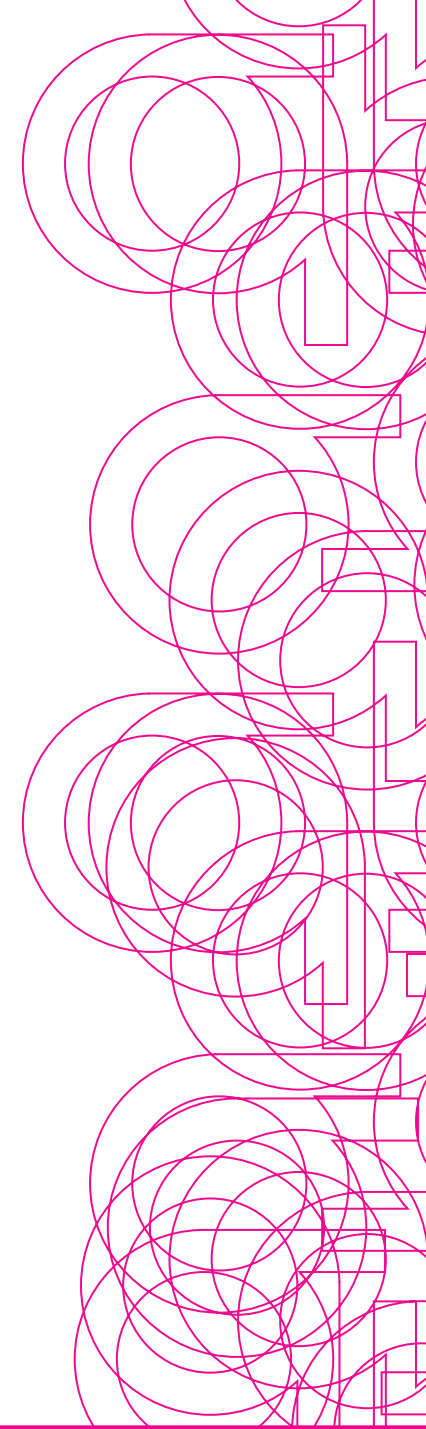
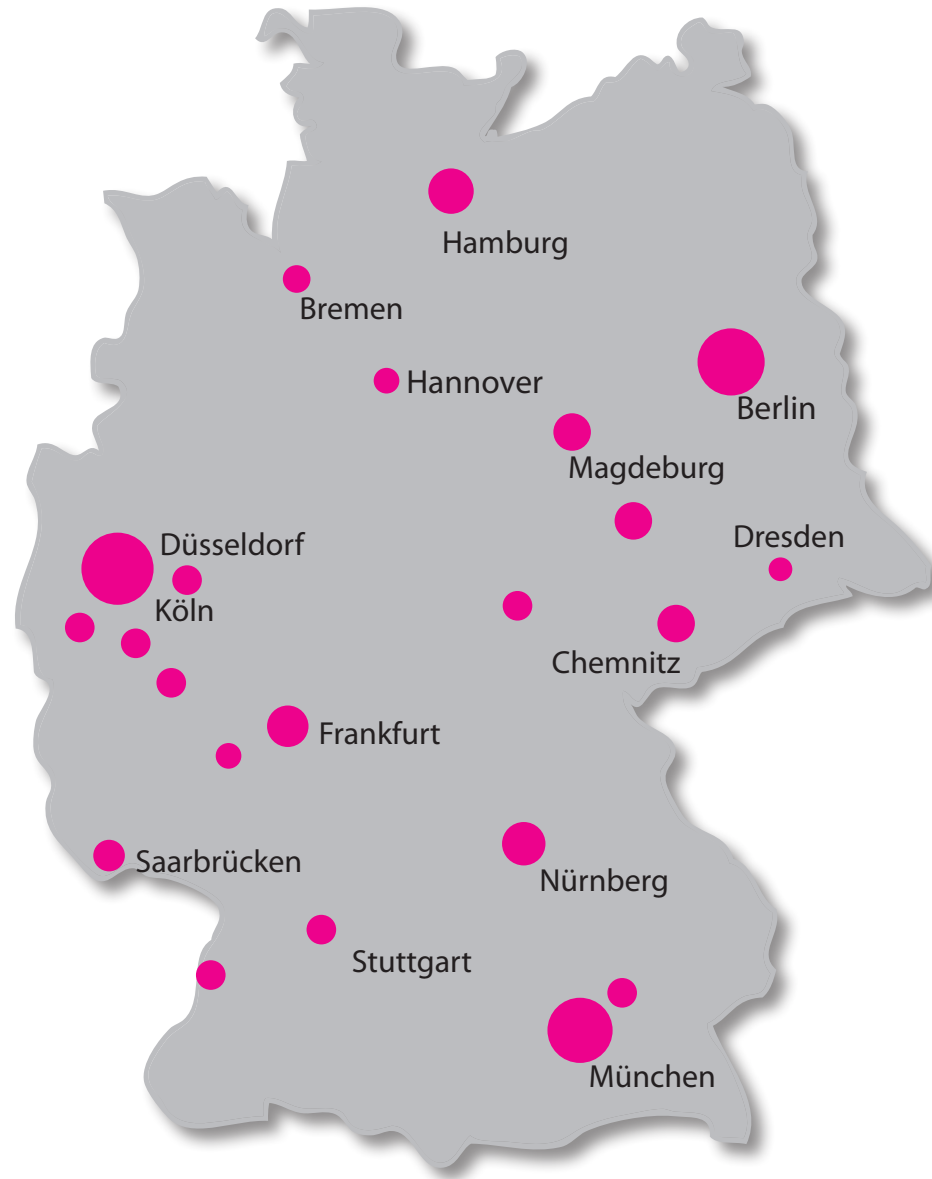
Welcome!



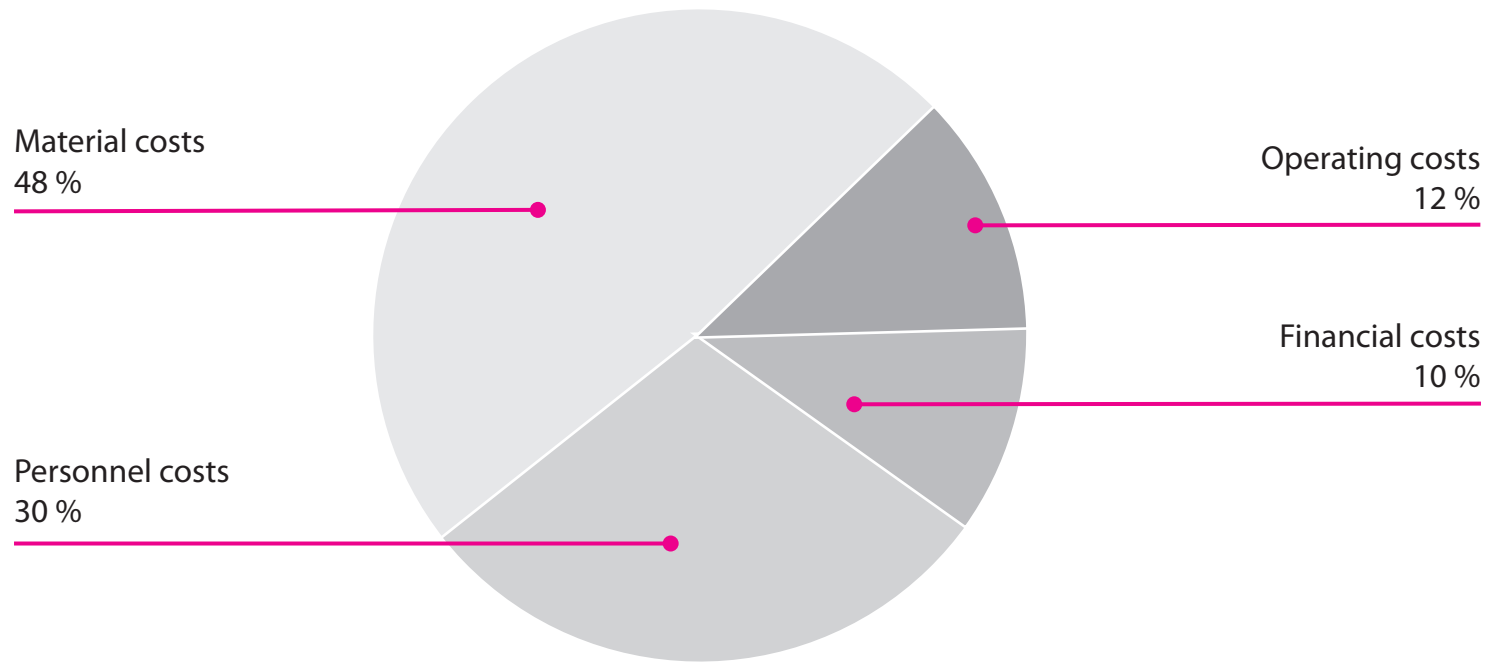
The present status of the German printing industry

Andreas Kowald, Thorsten Abrahamczik
Bachelor and Master Students in Print and Media Technology

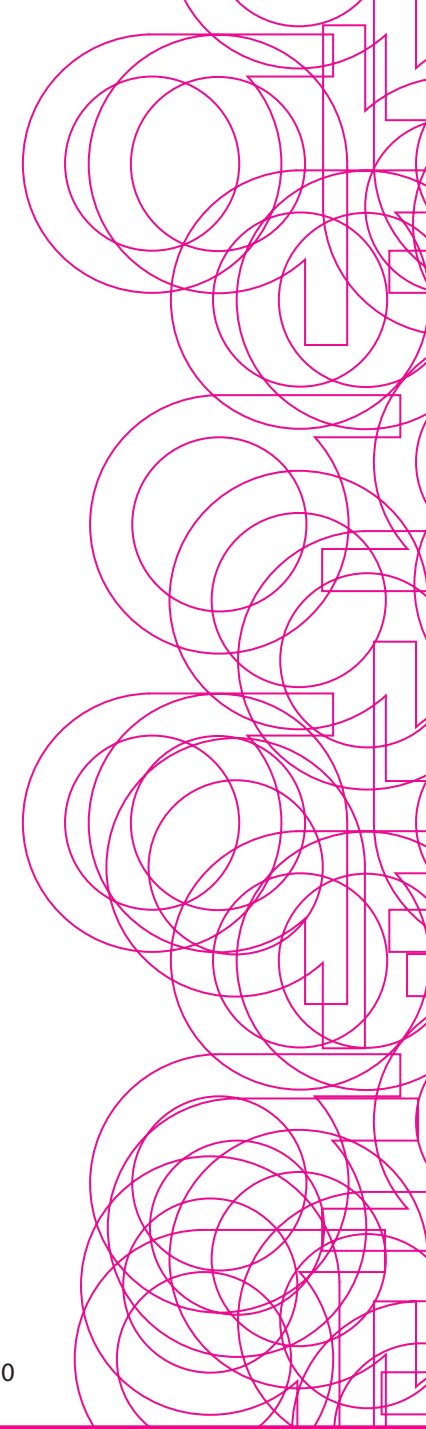
Printing industry in Germany



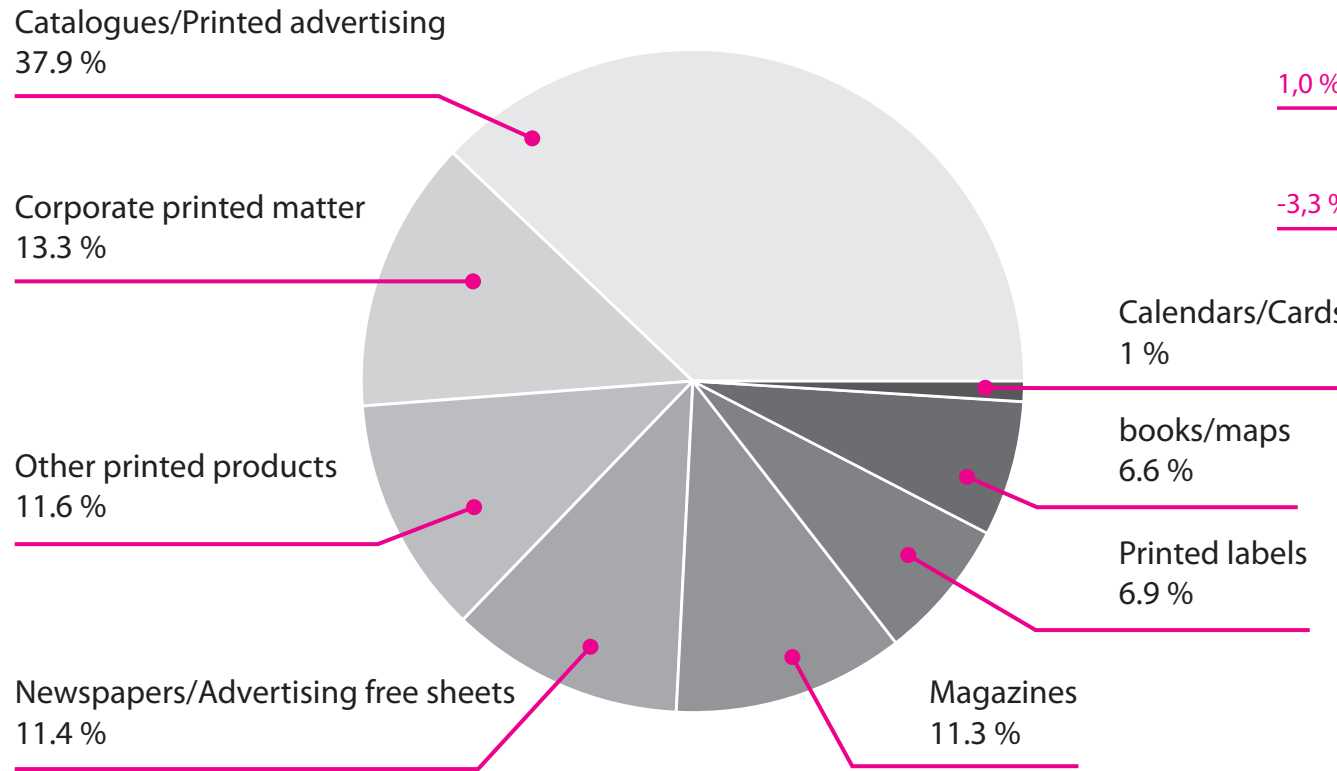
Cost structure



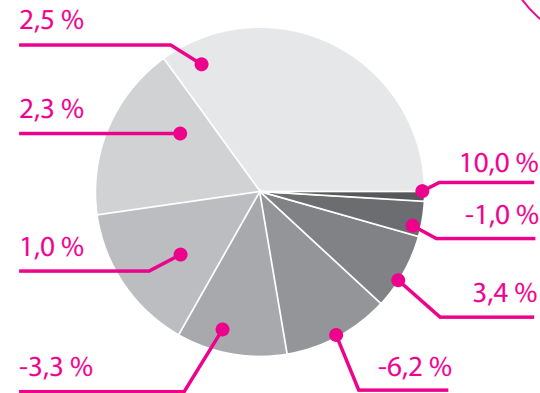
Source: bvdm, Jahreskonjunkturanalyse Deutsche Druckindustrie 2010



Production figures 2008



Print products total: 16,167 million Euro
(0,4 % plus compared to 2007)

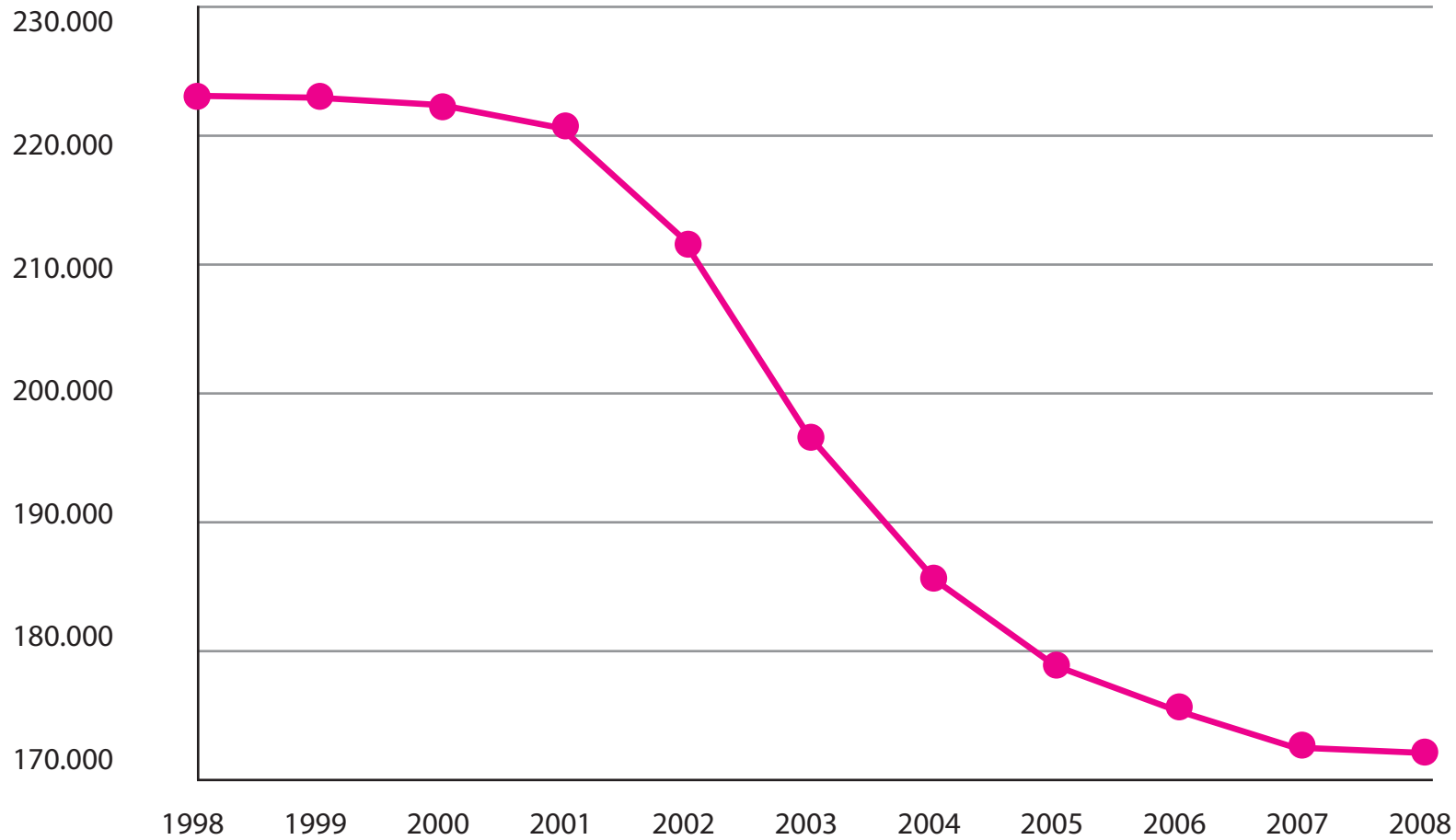


change on previous year

Source: bvdm, Jahreskonjunkturanalyse Deutsche Druckindustrie 2010

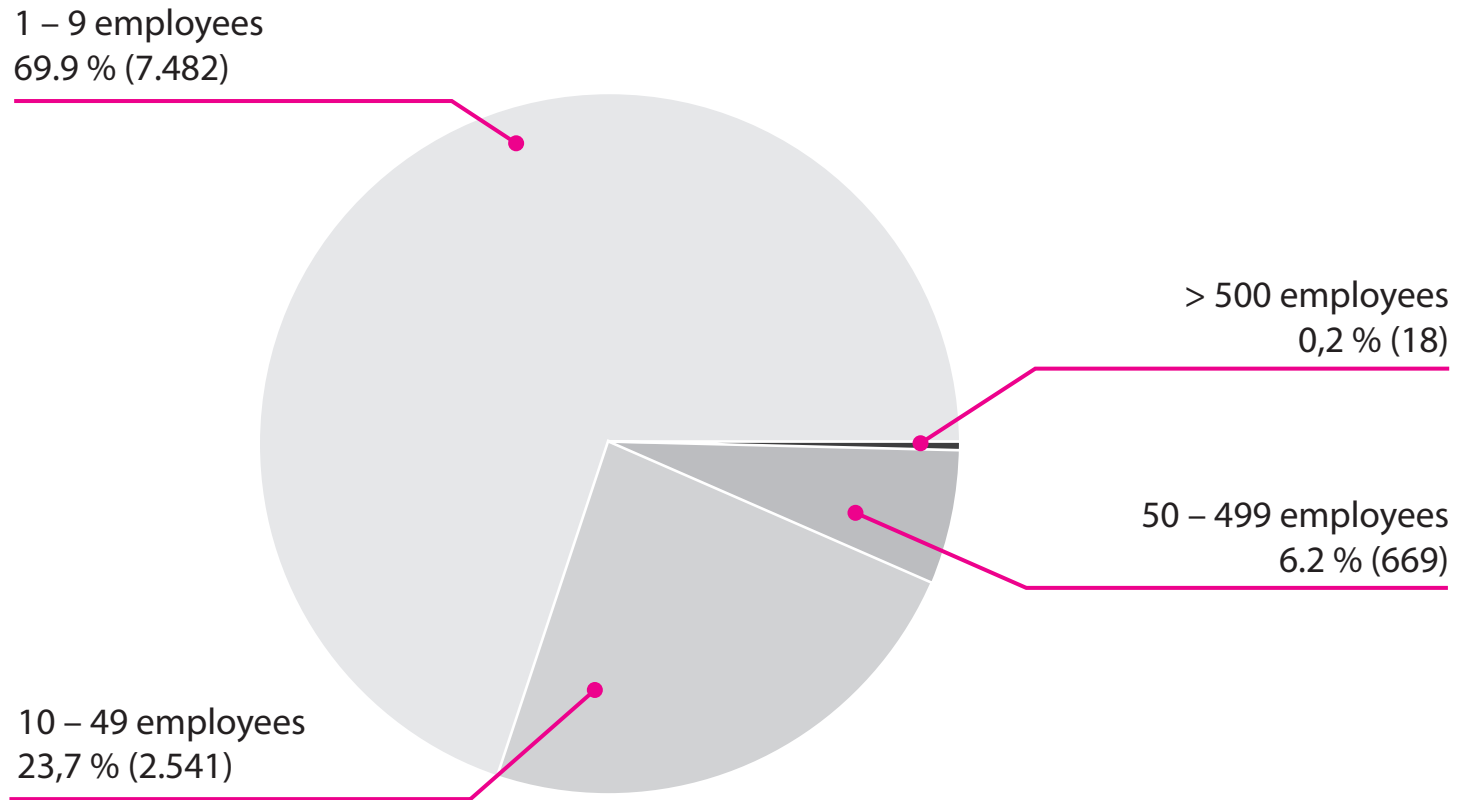
Pensionable Employment

Number of staff



Source: bvdM, Jahreskonjunkturanalyse Deutsche Druckindustrie 2010

Number & size of enterprises

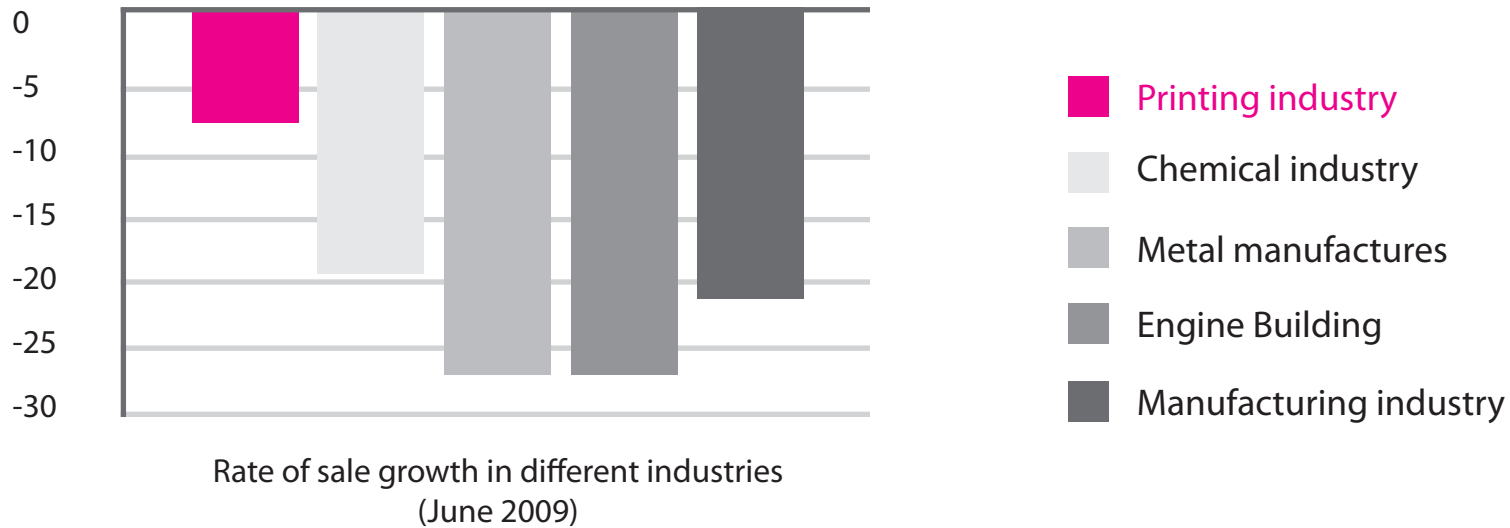


Total number of enterprises in printing industry: 10.710 (2008)
(–23,1 % compared to 2000)

Source: bvdm, Annual Business Cyclic Analysis – German Printing Industry 2010

Rate of sales growth

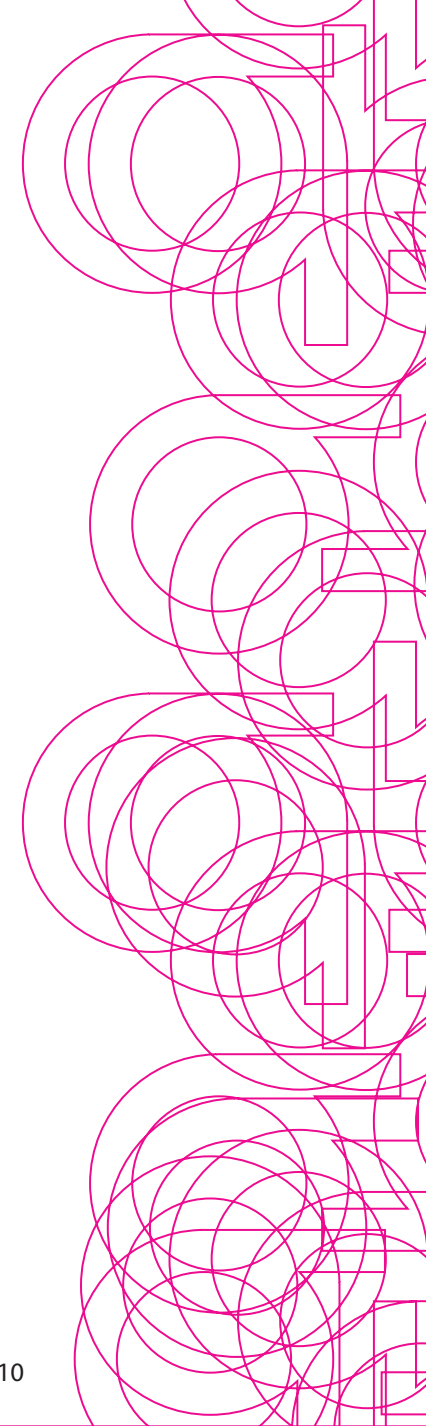
% compared to same month in previous year



\$\$\$ Sales Ranking \$\$\$

- 1 Printing of print products (without newspaper printing)
- 2 Newspaper printing
- 3 Print finishing
- 4 Media and pre-press

Source: bvdM, Annual Business Cyclic Analysis – German Printing Industry 2010

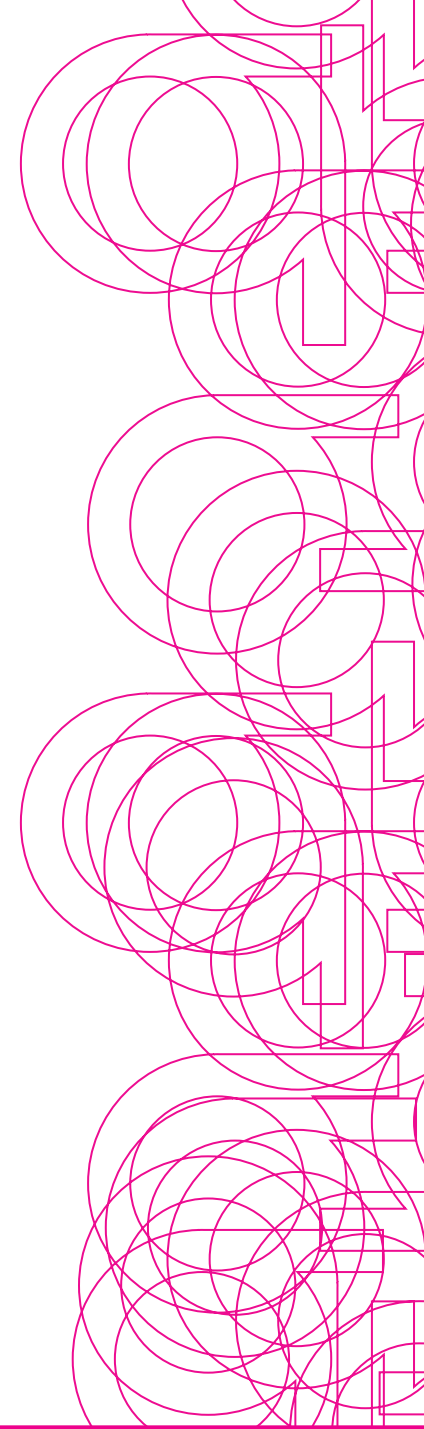


Current developments

- Times of rapid changes
- Companies are struggling
- New technologies are emerging

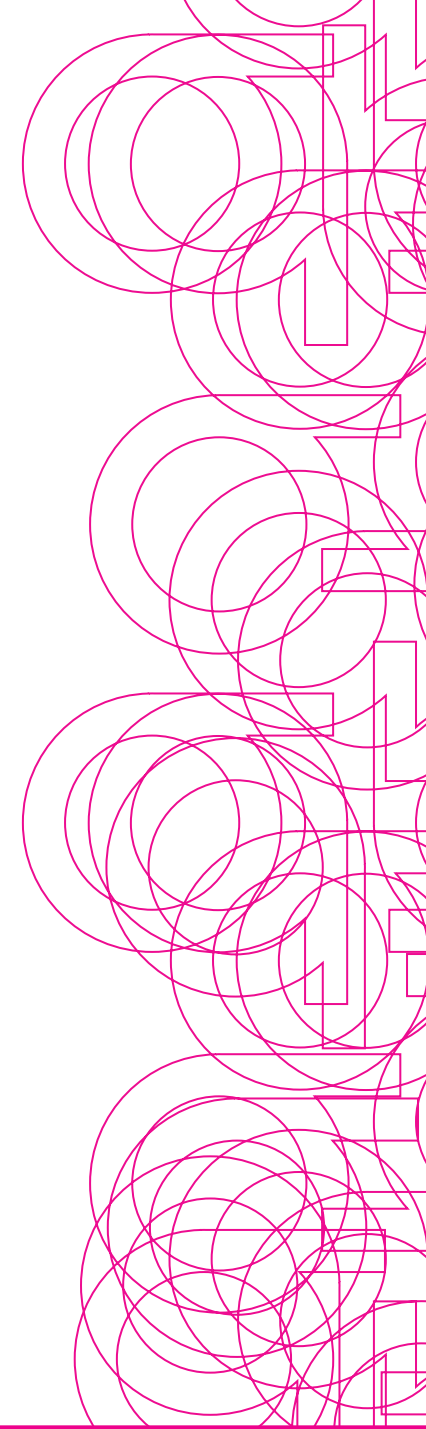
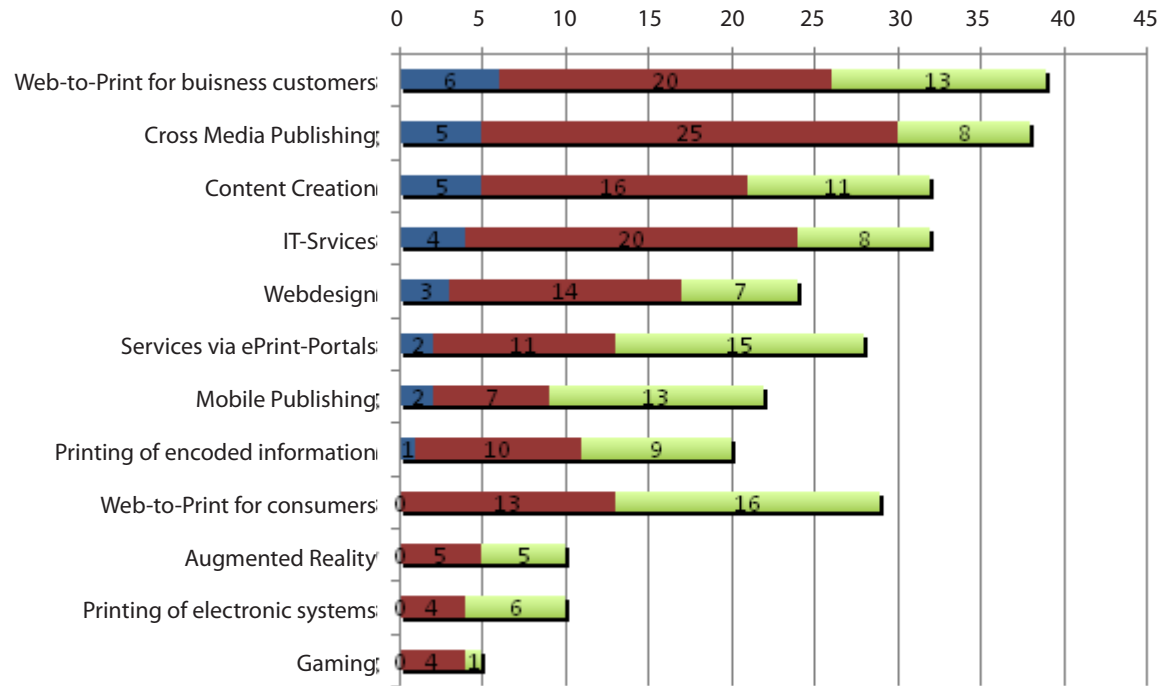
Conclusions

- Need for reorientation
- Make use of new technologies



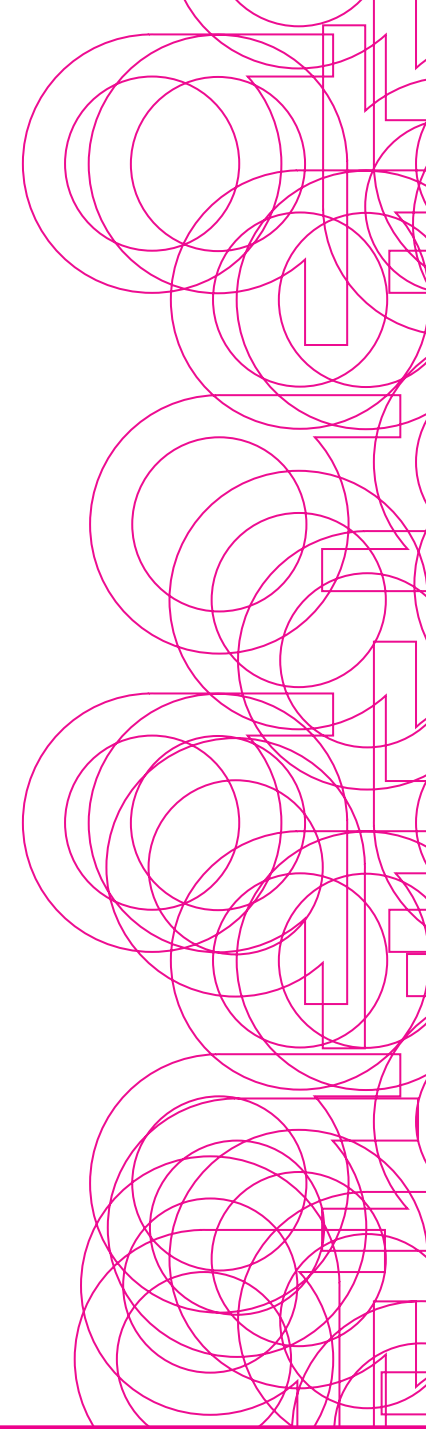
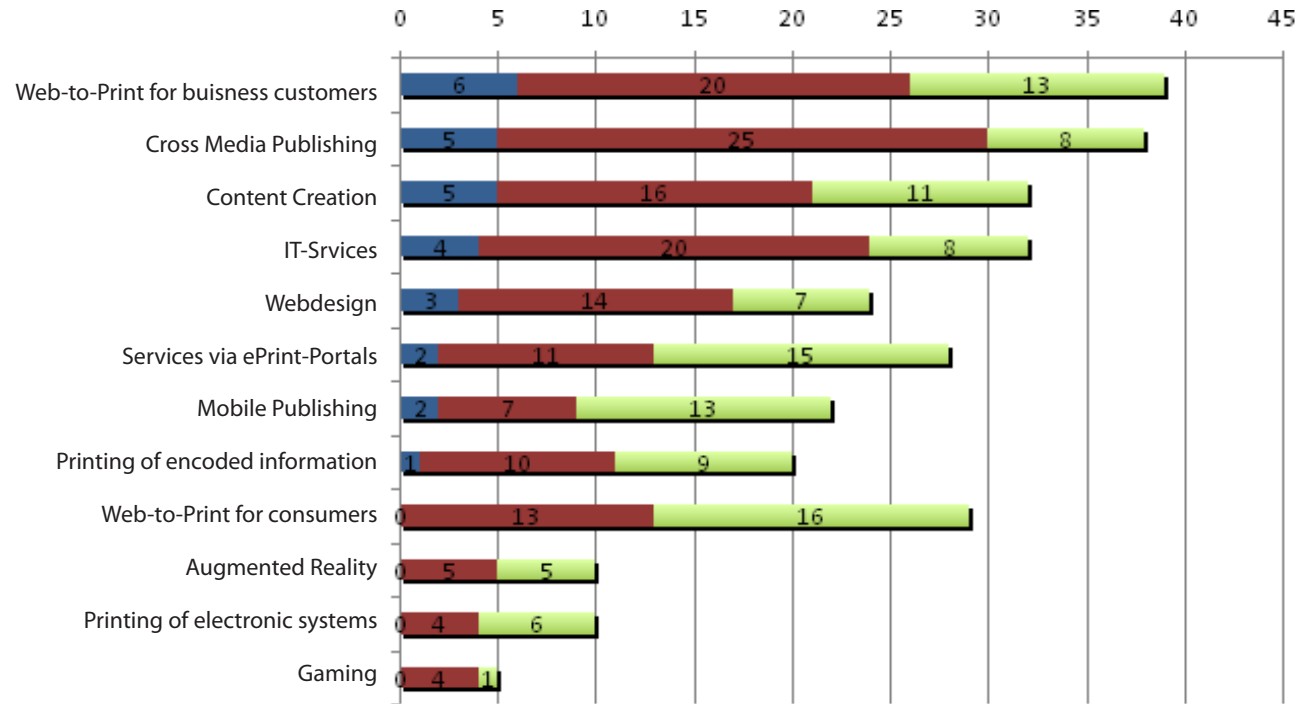
Current developments

Future Business Areas



Current developments

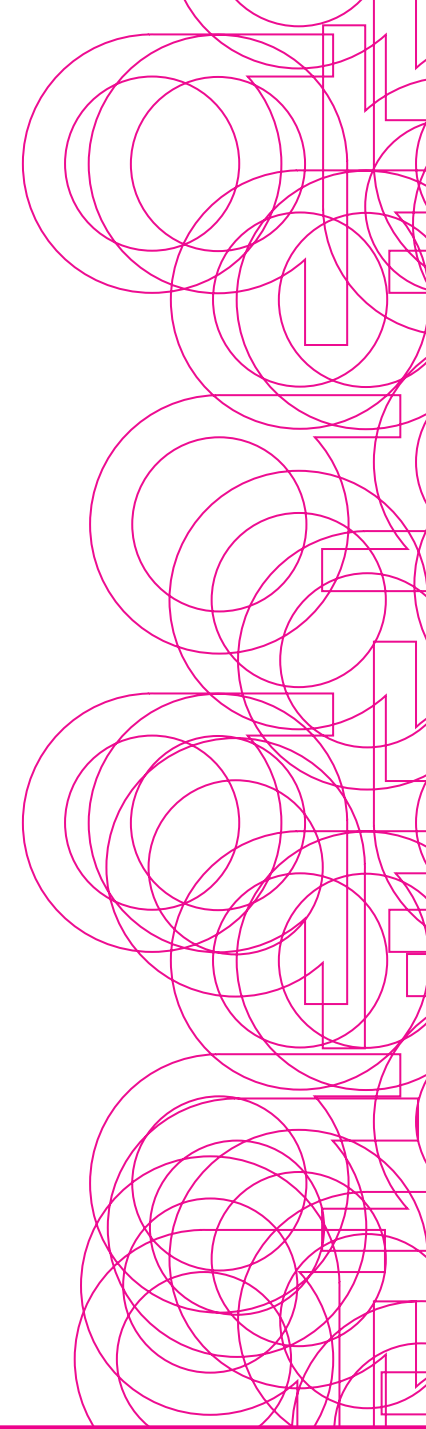
Future Trends



Conclusion

Future Trends

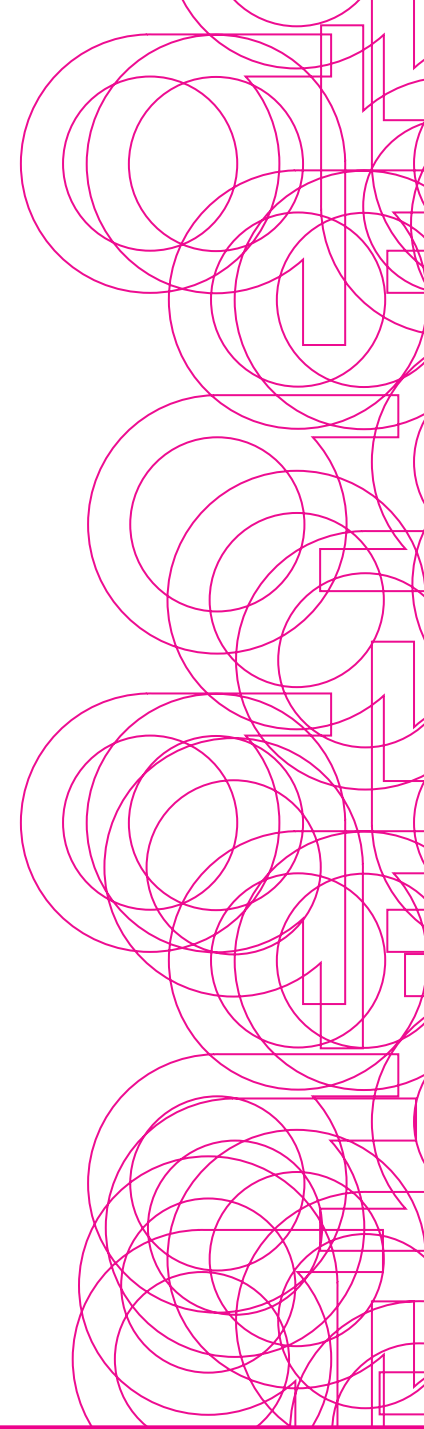
- New business areas and distribution channels



Conclusion

Future Trends

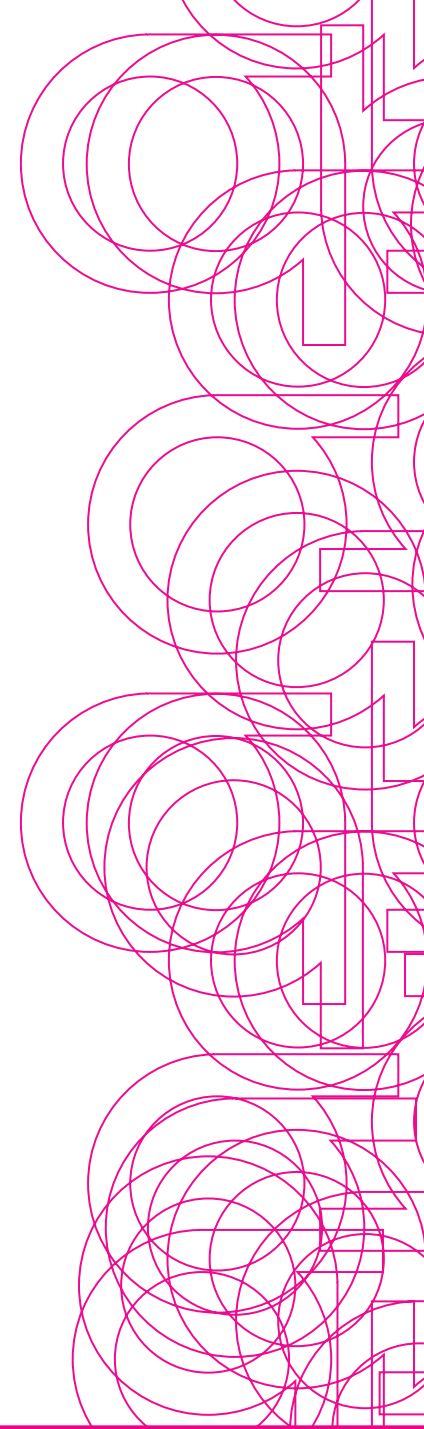
- New business areas and distribution channels
- Strong business models are needed



Conclusion

Future Trends

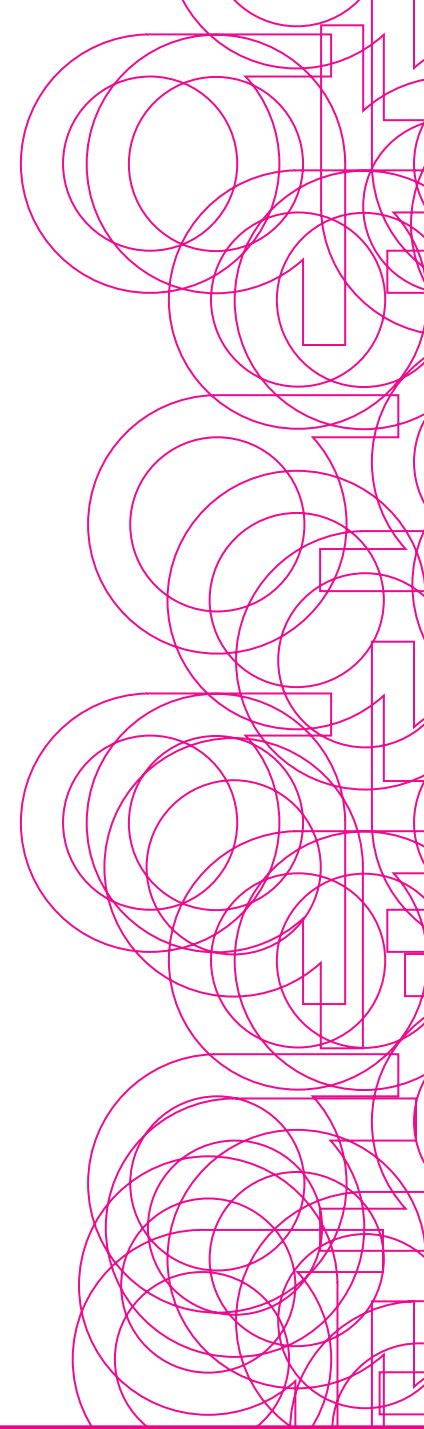
- New business areas and distribution channels
- Strong business models are needed
- Marketing becomes more and more important



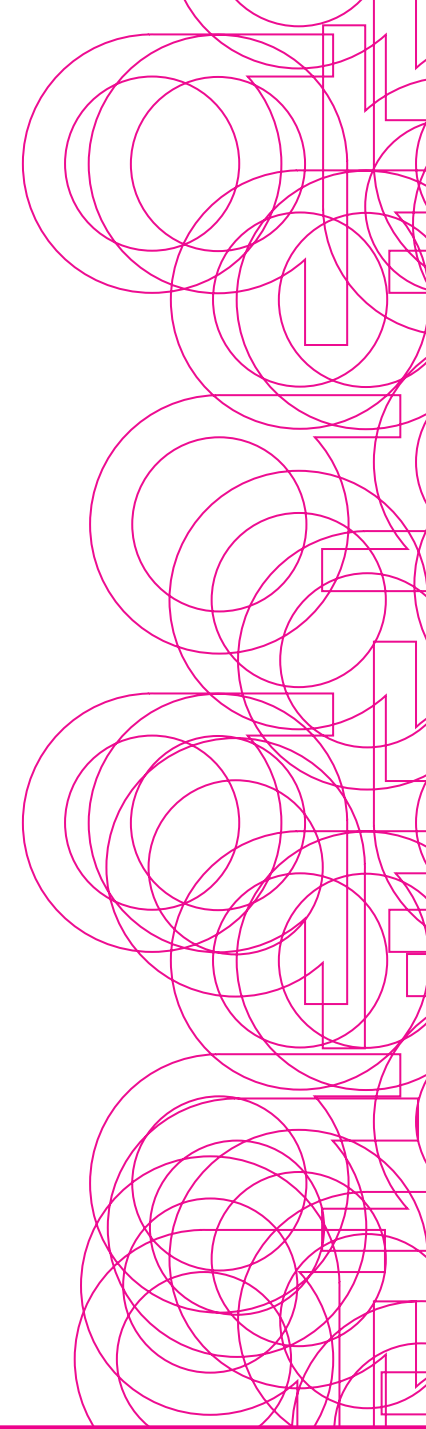
Conclusion

Future Trends

- New business areas and distribution channels
- Strong business models are needed
- Marketing becomes more and more important
- Print companies need to learn



Questions?



Thank you Ladies and Gentlemen
for your attention!