

2020



June 16-26, 2020
Düsseldorf/Germany
www.drupa.com

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drupa 2020 – Pressemeldung No. 2 / Februar 2017

Out soon: 4th drupa Global trends Report 2017

- **General confidence amongst printers and suppliers for 2017 but mixed fortunes for markets and regions alike**
- **Strong plans for capital investment with Finishing the No.1 priority and Sheetfed offset leading press investment plans**

Following the successful drupa in Spring 2016, this 4th annual Global Trends report gives the detailed evidence to support the thesis that globally Print is recovering well from the double challenge of the 2007/8 economic crisis and the strategic shift towards digital communications.

Sabine Geldermann, Director drupa, Messe Duesseldorf, said, "Last year's drupa showcased a global print industry that has regained its confidence in the future, with lots of fresh technology and applications demonstrated to enthuse both printers and their customers alike. This report shows that whilst levels of confidence vary between regions and markets, overall the print industry is on the up and will invest strongly to secure a prosperous future."

Recruited from senior managers who visited drupa last year, almost 850 printers and over 300 suppliers representing all regions and markets participated in the survey run by Printfuture, the specialist print consultancy and market research company. "All printers, whatever market or region they are based in, know that if they are to succeed in the long term, they must continue to adapt to the ever



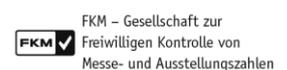
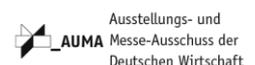
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changing market and economic conditions. This needs a ruthless approach to efficiency and automation while at the same time learning new skills and adding new added value services. Nevertheless it is pleasing to report that overall, print has got its 'mojo' back."

General confidence amongst printers and suppliers for 2017

Globally 42% of printers described their business as in a 'good' economic condition in 2016, with just 11% reporting it as 'poor', a net balance of +31%, the highest recorded global result of the report series. Prospects for 2017 are better with a net balance of +46%.

However market variances and regional variances are growing. Packaging at +39% net balance and Functional (Industrial/Decorative) at +34% are strongest while Commercial at +26% and Publishing at 23% follow behind. North America once again is the strongest region with a net balance of +49%, followed by Europe and Australia/Oceania at +33%, Central/South America at +29%, Asia at +20%, the Middle East at 19% and Africa at -3%, the first negative net balance of the report series. Indeed on many measures, the Middle East reported a very poor condition, while Africa and Central/South America reported fragile conditions.



Looking at the underlying financial performance figures, printers reported a well-established pattern of falling prices and squeezed margins, compensated for by increasing revenues assisted by higher utilisation. In terms of conventional print, the well-established trends continued of falling run lengths and lead times and an increasing number of jobs to be handled.

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Notable pause reported in the growth of digital print and a clear fall in the number of Web to print installations

What was different this year was a possible pause in the historic rise in the proportion of turnover that is digital print (28% of printers in 2015 reported that more than 25% of their turnover was digital while the figure for 2016 was 27%). Nevertheless digital print has an ever-increasing hold on Functional print with inkjet the dominant technology for most applications, up from 61% in 2014 to 74% in 2016. Similarly digital continues to grow rapidly in Commercial print e.g. wide format print installations up from 37% in 2013 to 50% in 2016. The much talked of growth of digitally printed packaging is starting, with 34% of packaging printers offering digital print, up from 24% in 2014, although demand is patchy as yet.

Even more striking was the clear fall in the number of Web to print installations globally down from 26% in 2015 to 23% in 2016. This decline was not universal eg in Asia it rose, but in some regions eg North America and Australia/Oceania, the fall was decisive.

Turning to capital investment plans, 42% spent more over the last 12 months and just 11% spent less, a net balance of +31%, and there was a net balance of +41% in respect of plans for 2017. This positive story was true for most regions, the exception being the Middle East where there was a new low for the report series of just +5% in 2016. For the first time the No. 1 priority globally was Finishing, followed closely by new Presses. That in turn was closely followed by PrePress/Workflow/MIS; a sign that automation is being taken seriously.



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As for press investment plans, Sheetfed litho led the global race followed by Digital toner cutsheet colour. But what was another first for the report series, each of the four markets had a different No. 1 press investment priority – Commercial, Digital toner cutsheet colour; Publishing, Sheetfed offset; Packaging, Flexo and Functional, Digital inkjet rollfed colour.

Obtaining the full reports.

The full report will be released in English in a few weeks; the Executive Summary will be available in seven languages (German, English, French, Portuguese, Russian, Spanish and Chinese) at www.drupa.com. The three annual drupa Global Trends reports are complemented two drupa Global Insights reports, which focus on technical trends and changes. The first of these, “The Impact of the Internet on Print - The digital flood,” assessed the important and effect of new online media. The second report, “Touch the future – Applications that can create growth,” was published in November 2015. All reports are available for download from the drupa website.



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