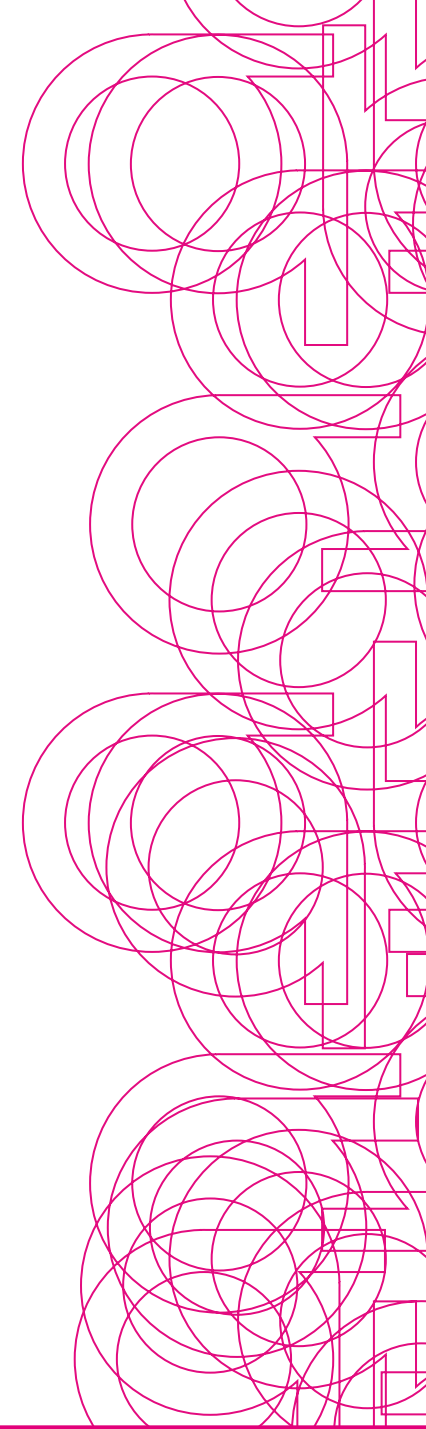
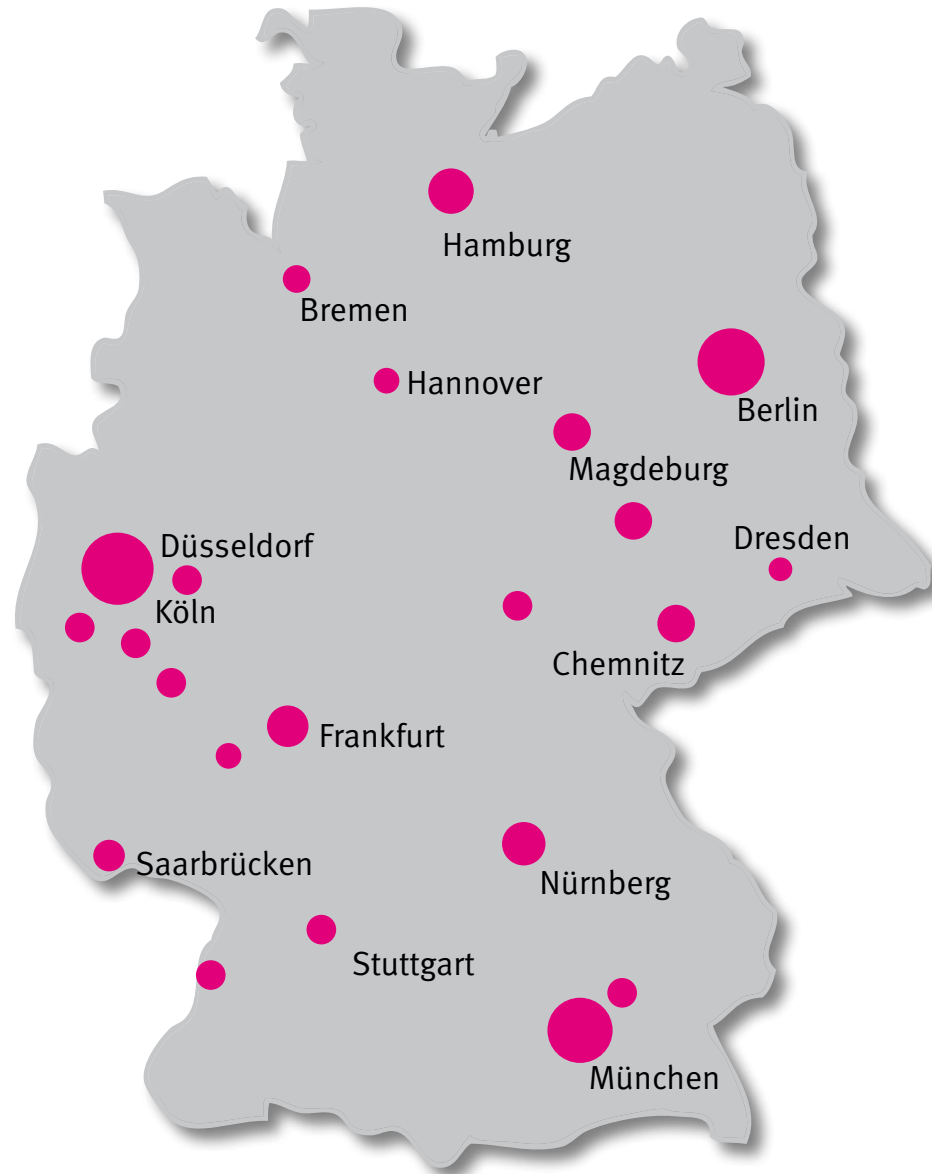


The Present Status of the German Printing Industry

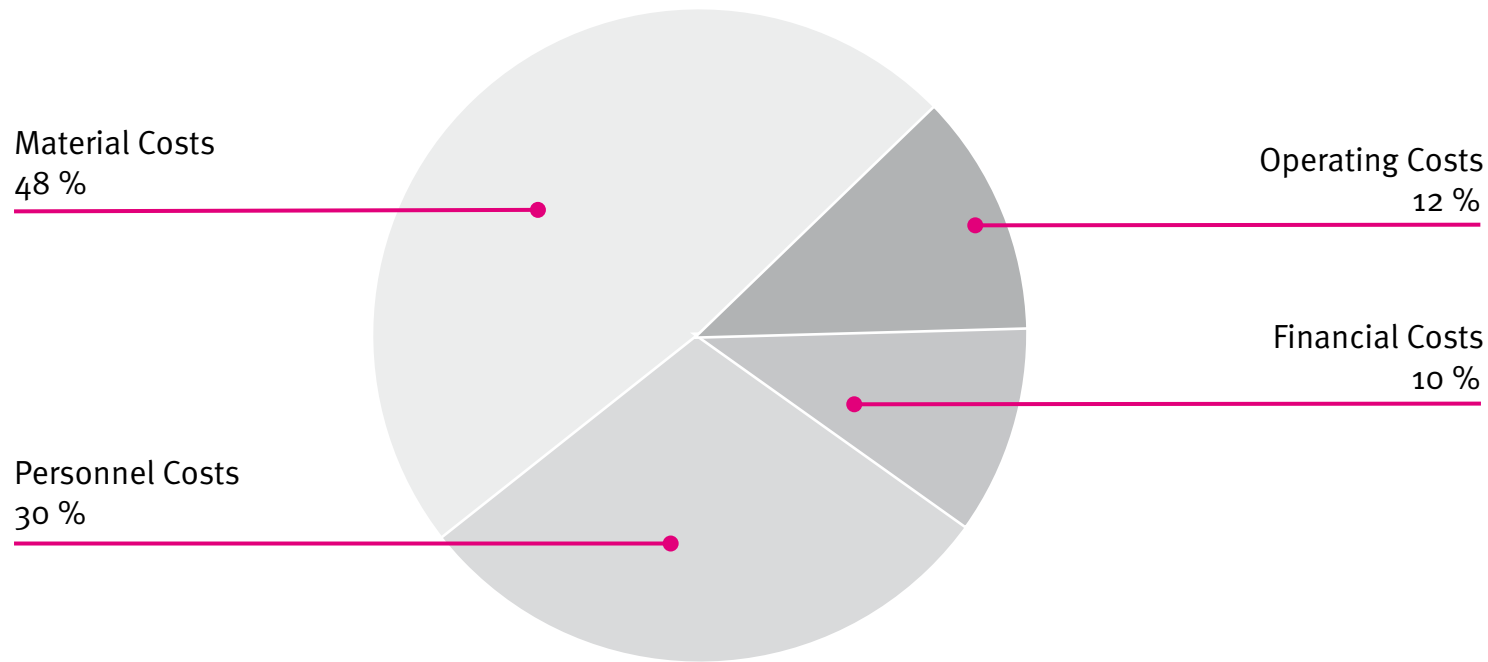
Susanne Baron, Kathleen Gutschmann, Vera Koch, Maria Omelchuk,
Silvio Schneider, Bettina Woock, Henriette Zarske

Print and Media Technology

Printing Industry in Germany



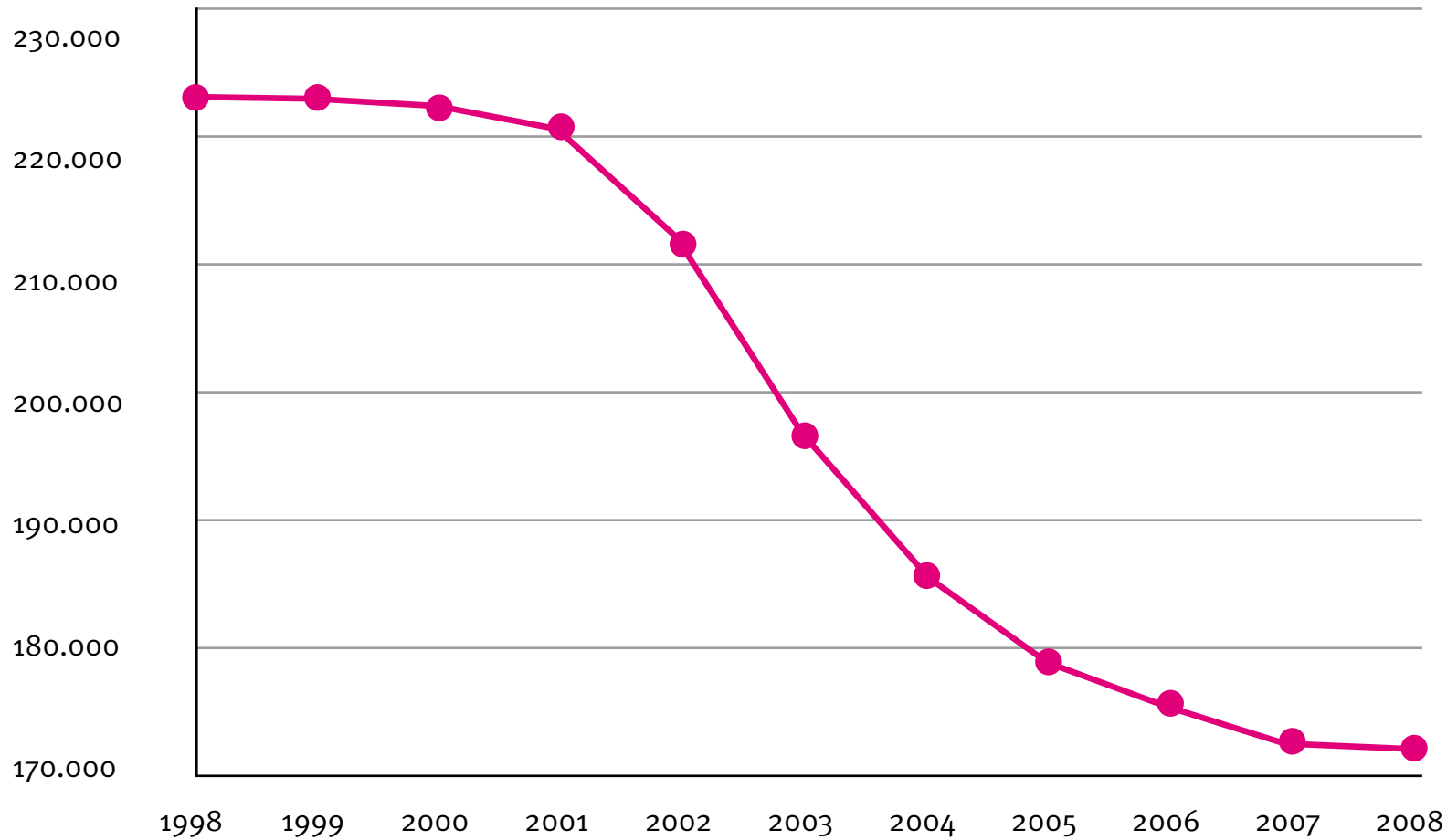
Cost Structure



Source: *bvdm, Annual Business Cyclic Analysis – German Printing Industry 2009*

Pensionable Employment

Number of Staff



Source: bvdm, Annual Business Cyclic Analysis – German Printing Industry 2009

Production Figures 2008

Catalogues/Printed Advertising
37.9 %

Corporate Printed Matter
13.3 %

Other Printed Products
11.6 %

Newspapers/Advertising Free Sheets
11.4 %

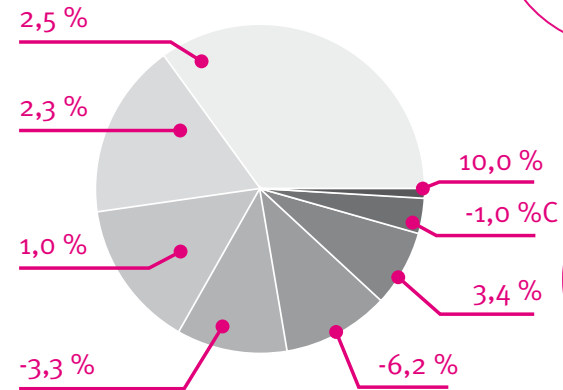
Magazines
11.3 %

Calendars/Cards
1 %B

Books/Maps
6.6 %

Printed Labels
6.9 %

Print Products Total: 16,167 Million Euro
(0,4 % plus compared to 2007)



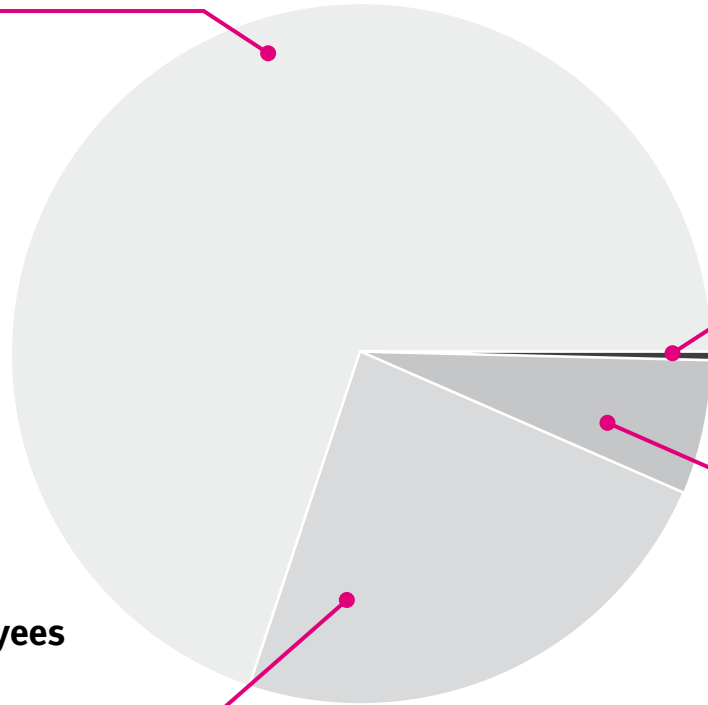
Change on Previous Year

Source: bvdm, Annual Business Cyclic Analysis – German Printing Industry 2009

Number & Size of Enterprises

1 – 9 Employees

69.9 % (7.482)



> 500 Employees

0,2 % (18)

50 – 499 Employees

6.2 % (669)

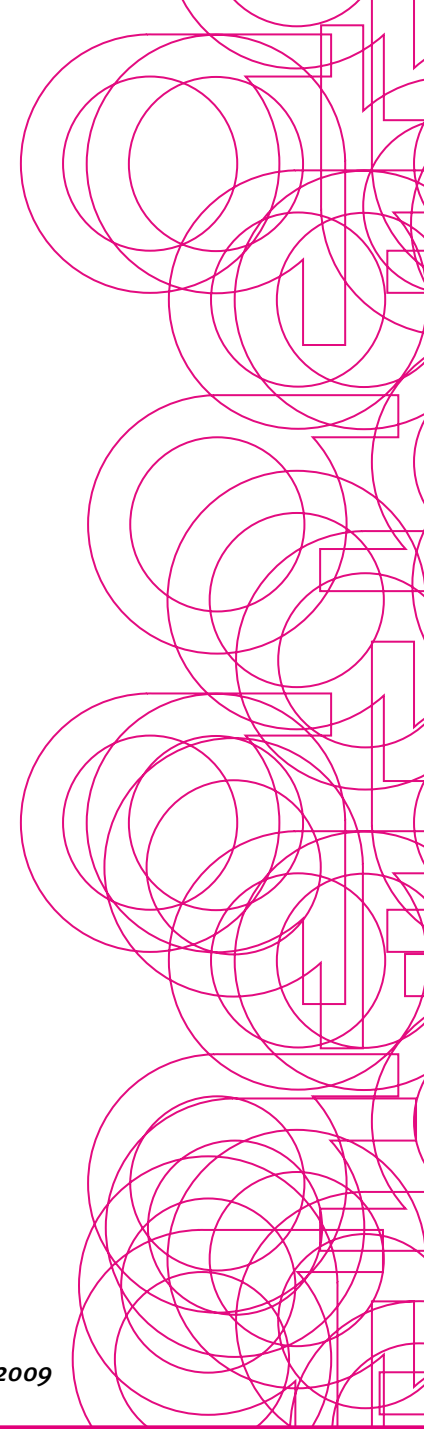
10 – 49 Employees

23,7 % (2.541)

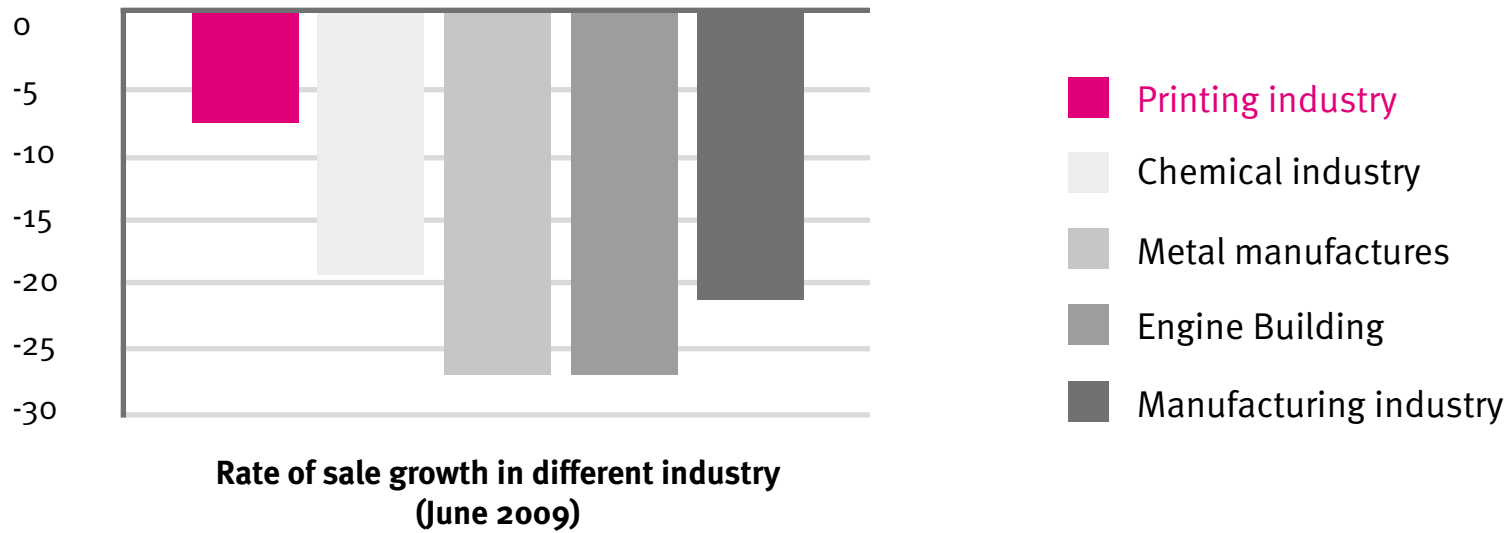
Total Number of Enterprises in Printing Industry: 10.710 (2008)
(–23,1 % compared to 2000)

Source: *bvdm, Annual Business Cyclic Analysis – German Printing Industry 2009*

Rate of Sales Growth



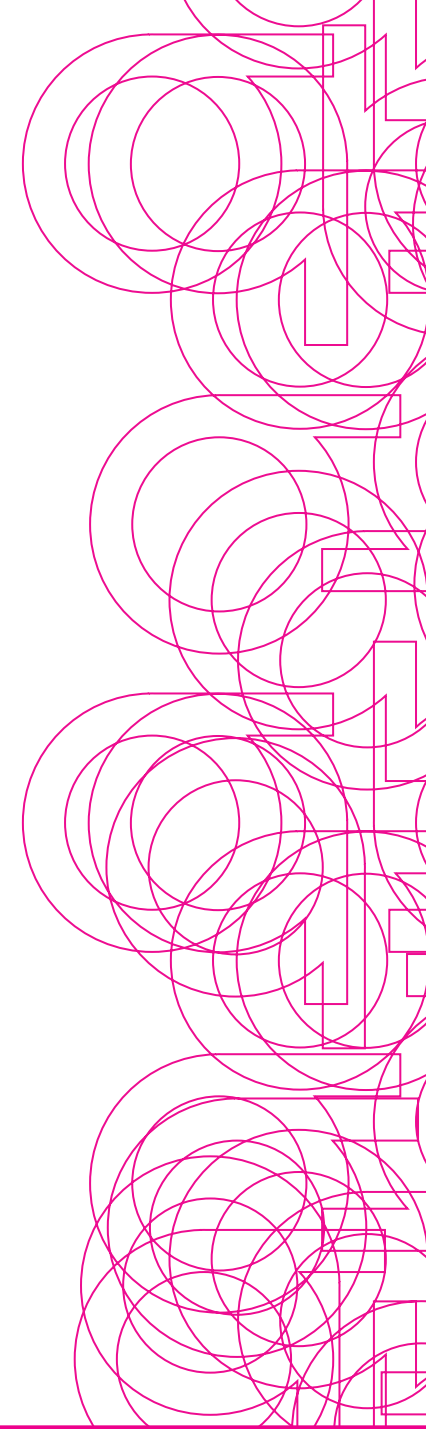
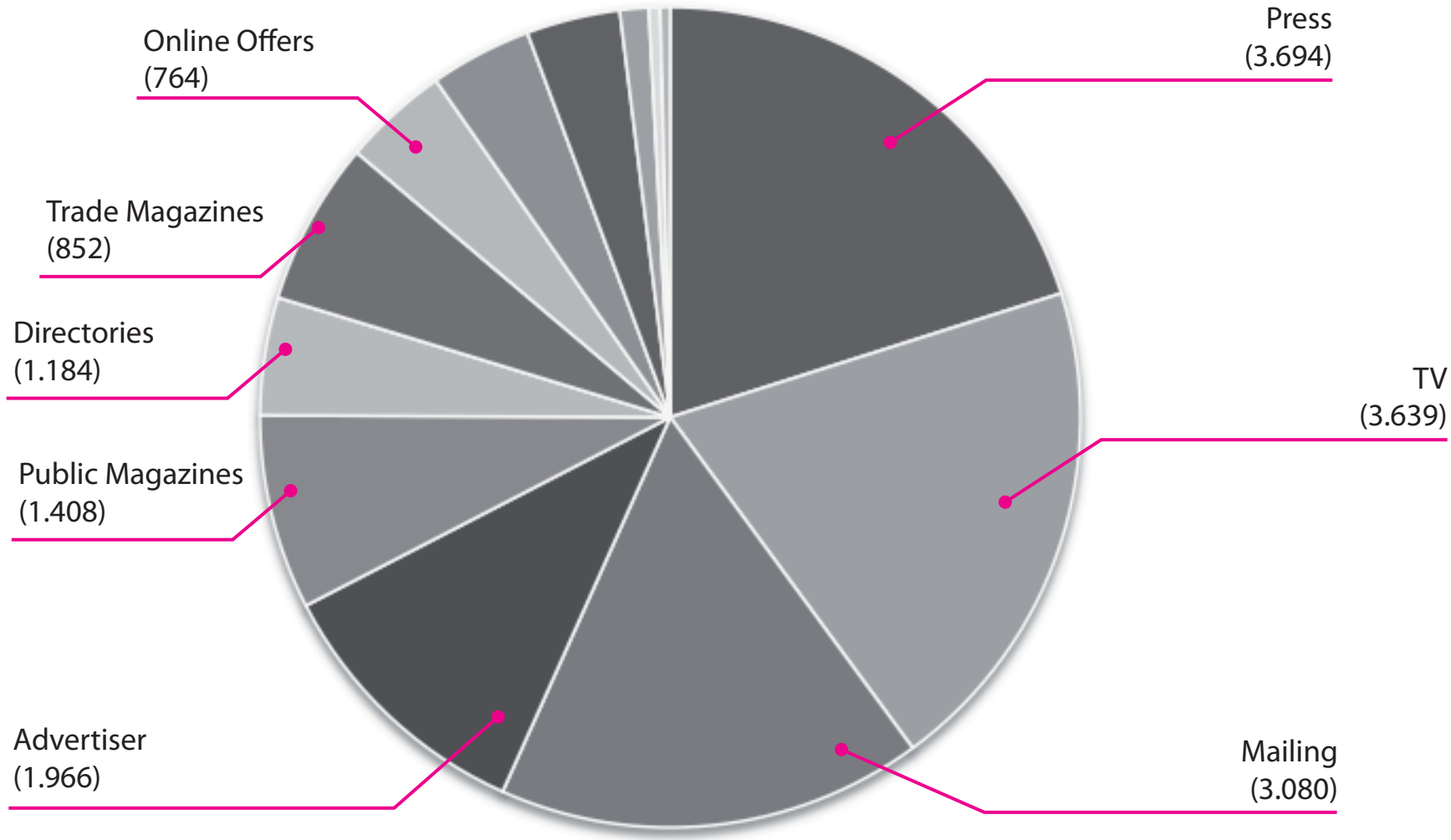
% compared to same month in previous year



Source: bvdm, Annual Business Cyclic Analysis – German Printing Industry 2009

Advertising Expenditure

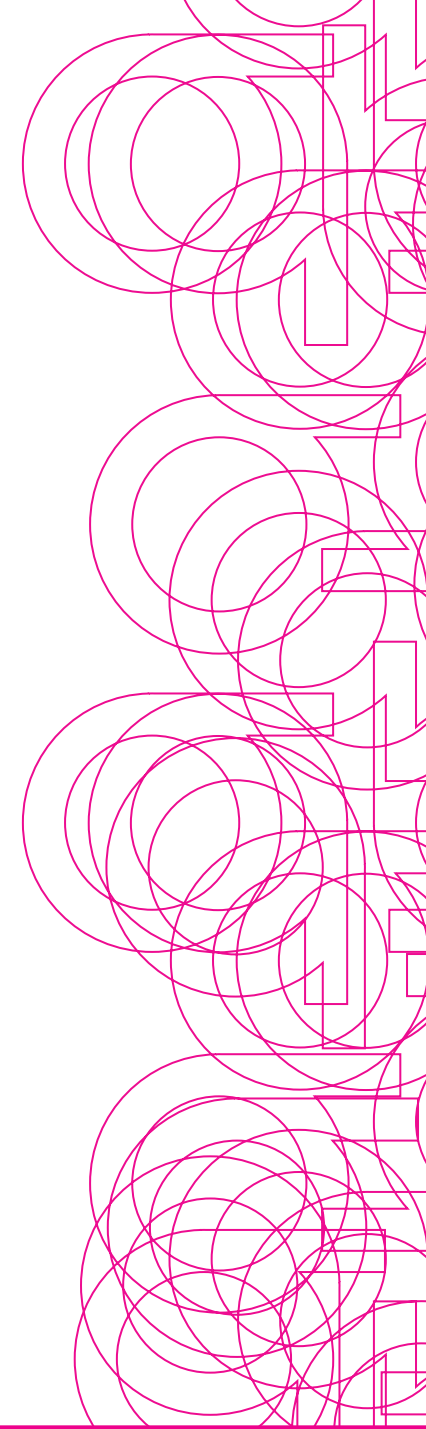
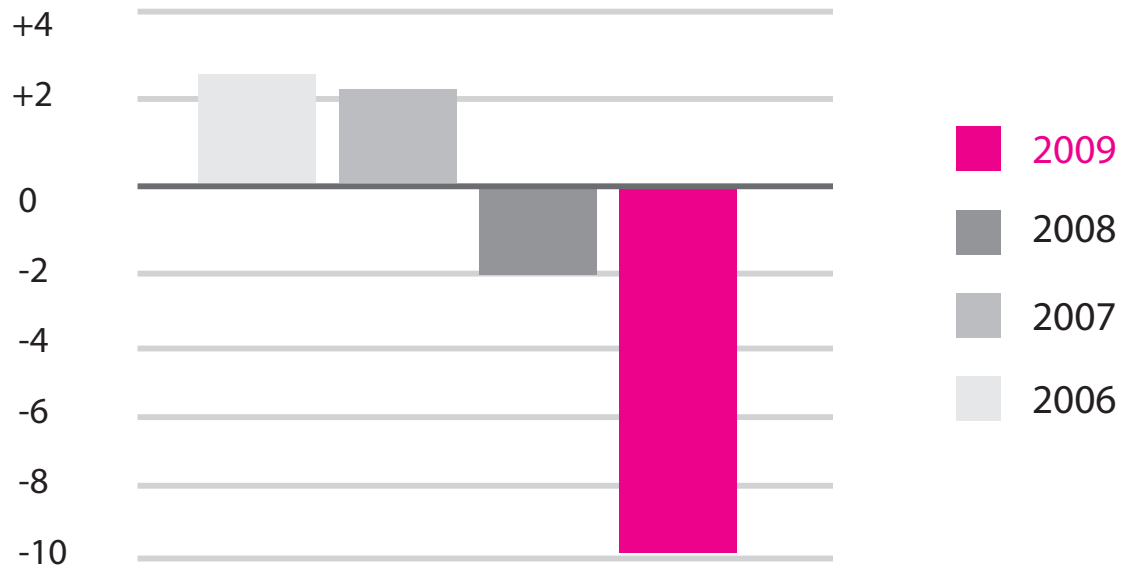
Net-Earnings in Million €



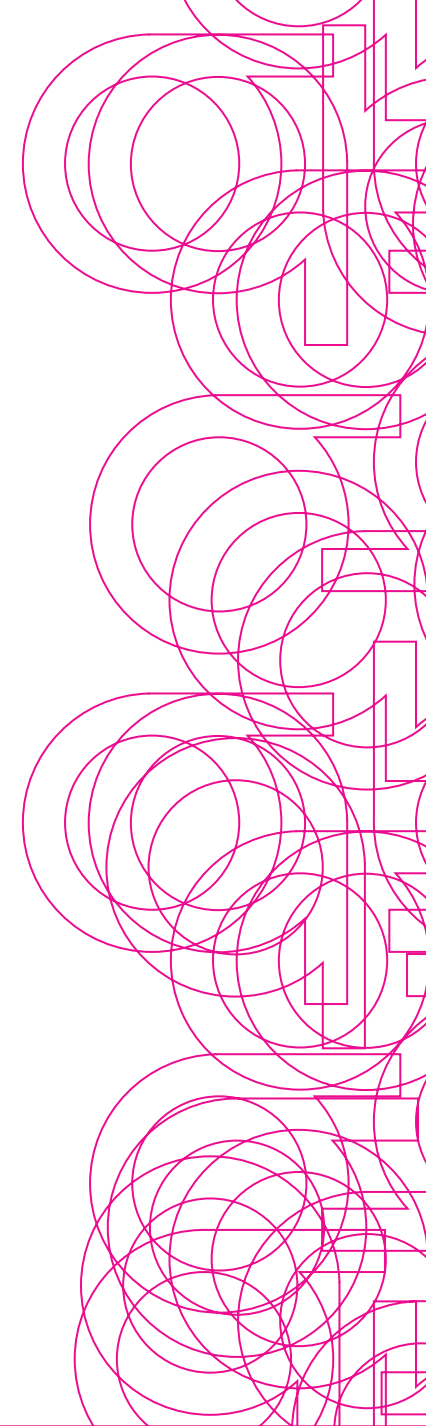
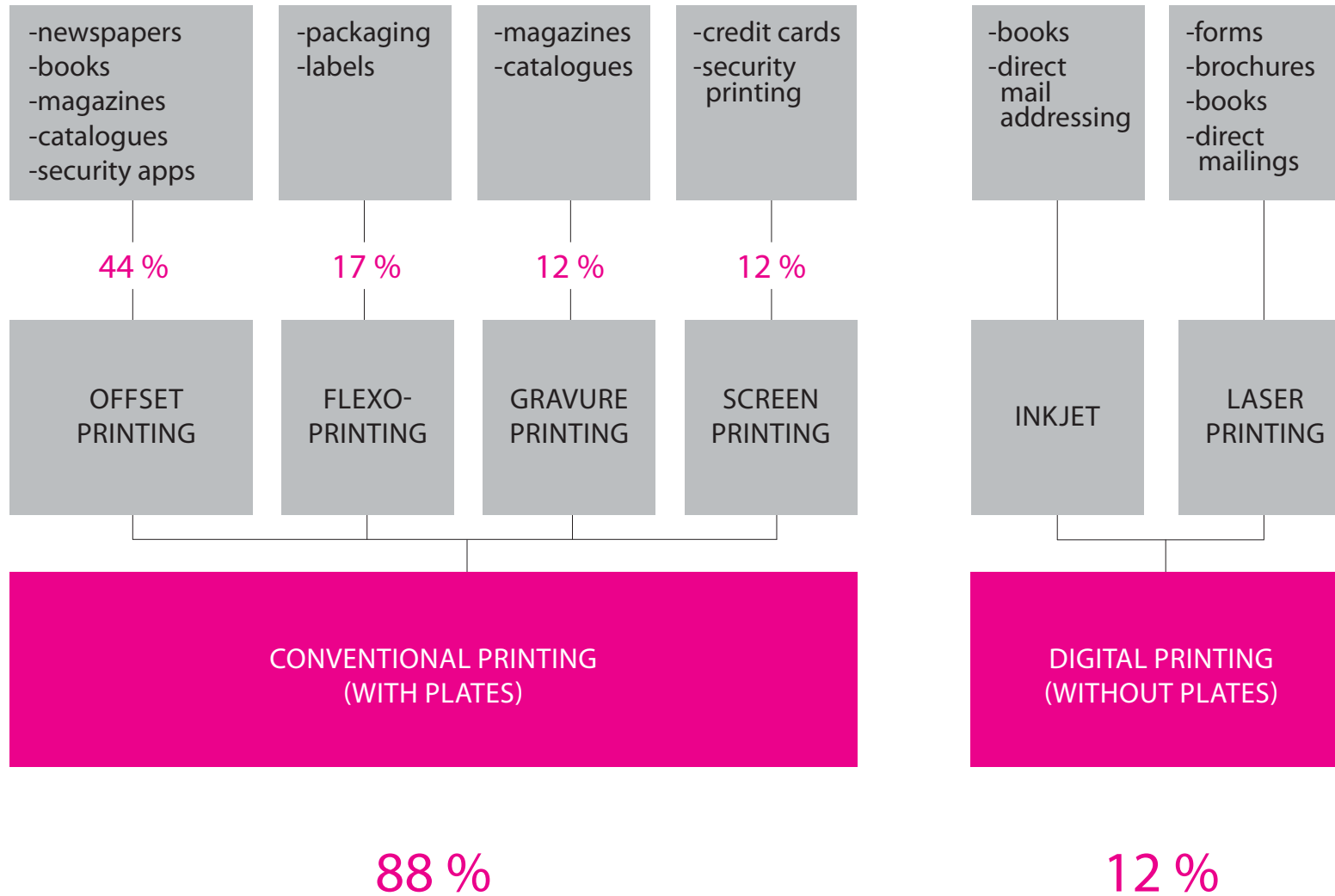
Advertising Expenditure

Future Trends

in % compared to previous years

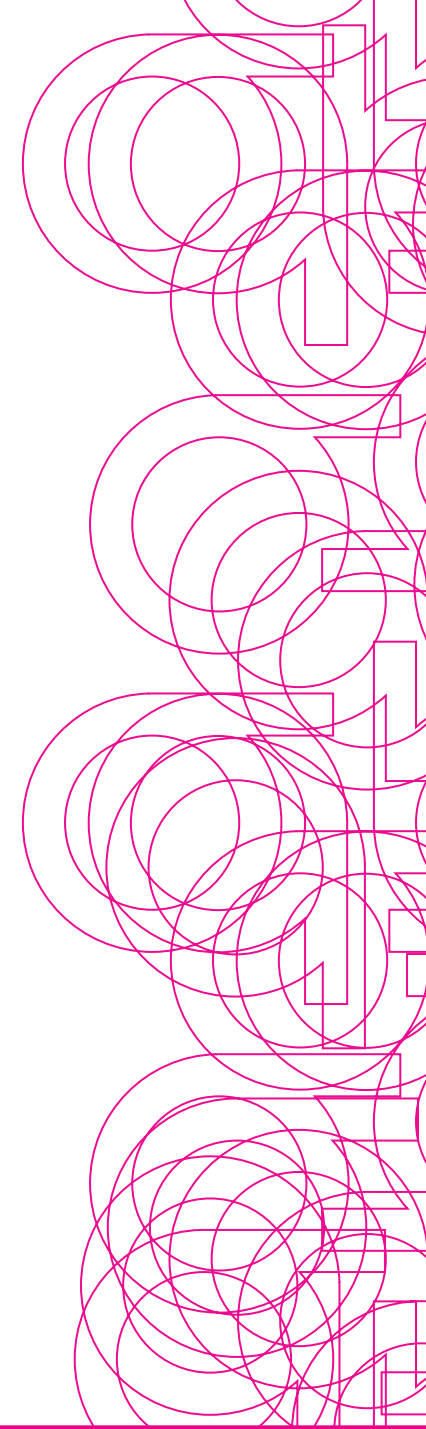


Printing Technologies



Developments in Production

- Processes and Workflows
- Products and Services
- Management and Organisation



Thanks for listening!

