



EUROPEAN COMMISSION
DG Employment, Social Affairs and Inclusion

Employment and Social Governance
Social Dialogue

Sectoral Social Dialogue Committee for « Graphical Industry »
Working Group meeting on 20 September 2017

Presentation about the state and future of the industry

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DG Imprimerie LABALLERY

Président Imprimerie FLOCH



2015 Printing Turnover in the main Western countries (without packaging and newspapers)

UK = 1,9 milliards € (+13%)

Germany = 1 milliard (-1%)

Italy = 820 M€ (+2%)

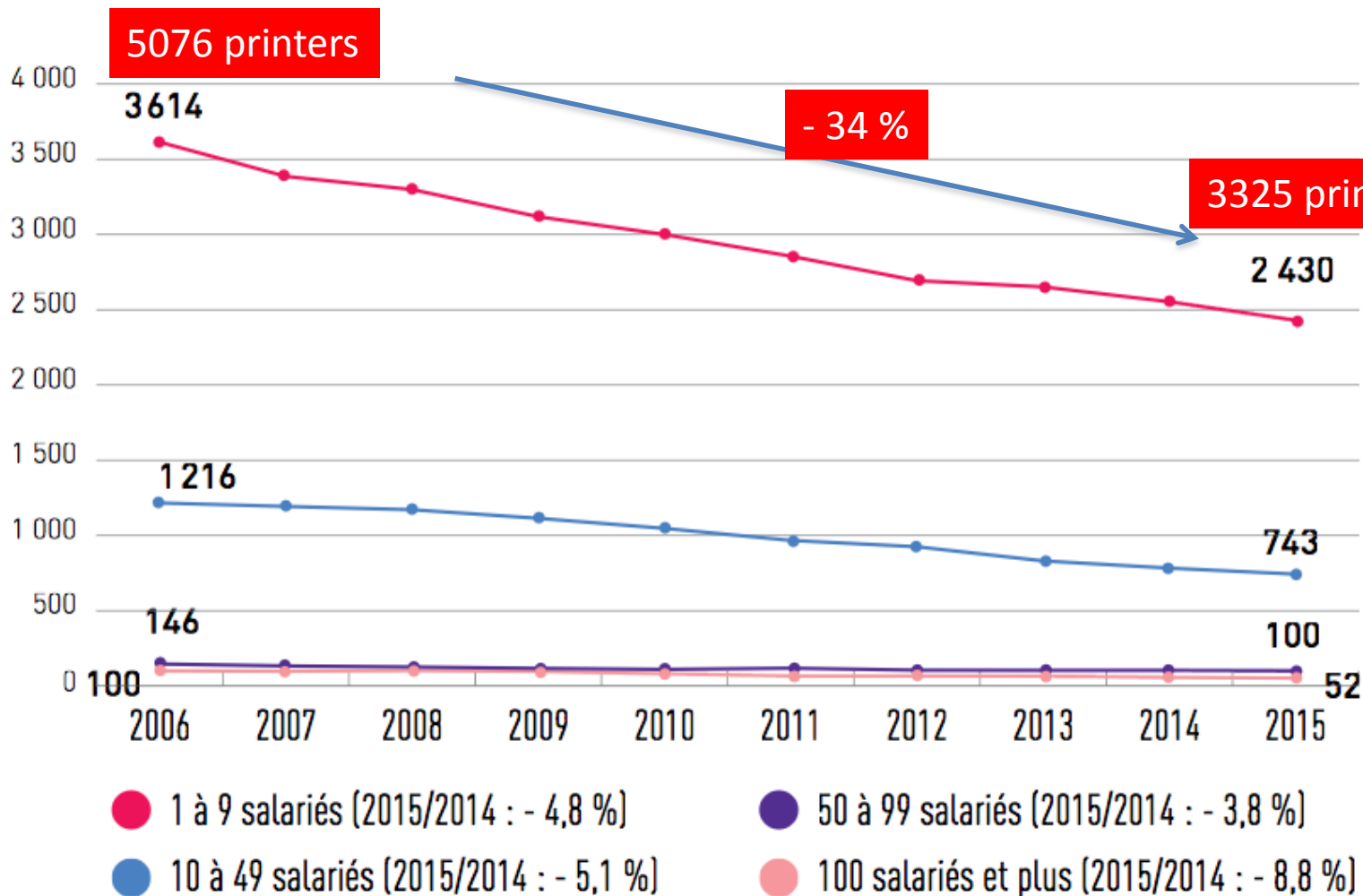
Spain = 530 M€ (-4%)

France = 300 M€ (-6%)

Netherlands = 230 M€ (-12%)

Belgium = 150 M€ (-9%)

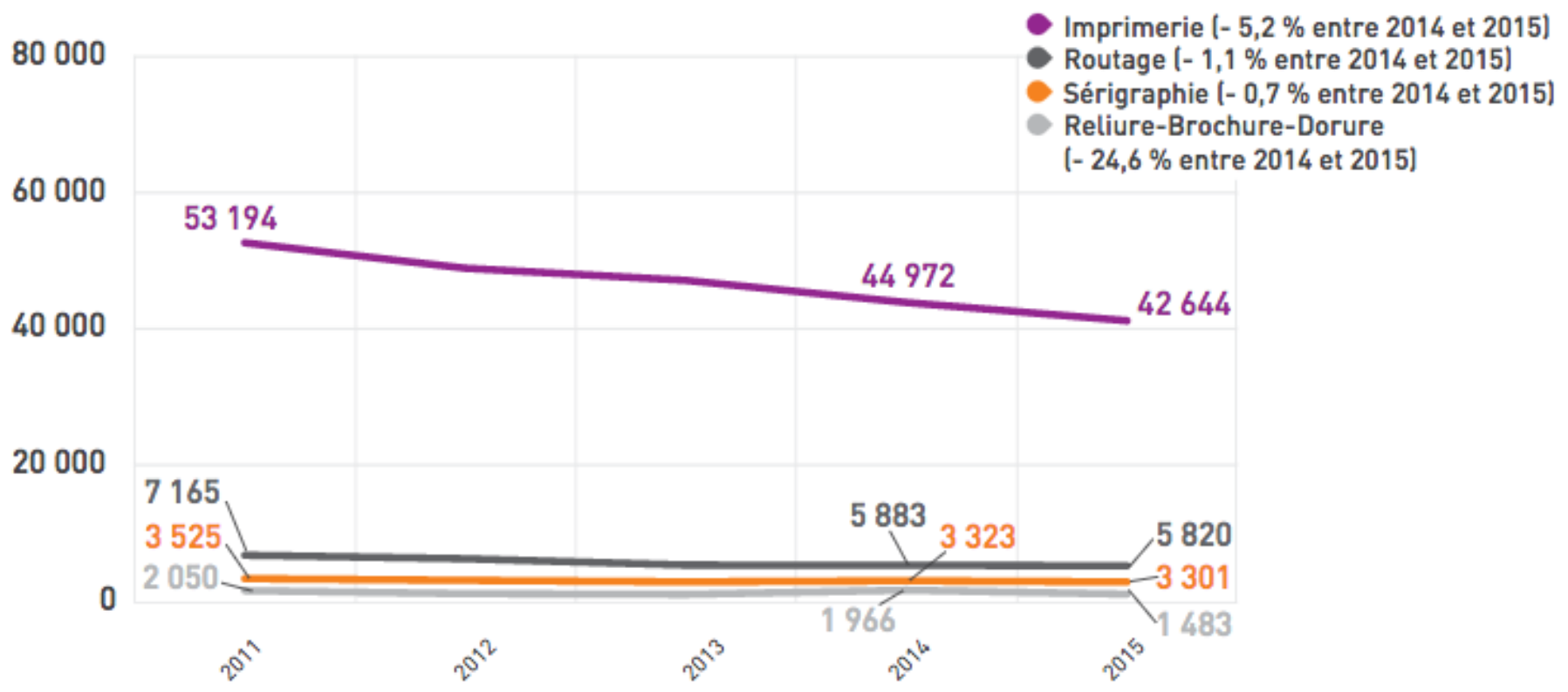
| Imprimerie - Évolution du nombre d'établissements



Source : AGEFOS PME - CGM, Mise en forme : IDEP

Salariés : 53 248 salariés en 2015

Évolution du nombre de salariés par secteur d'activité

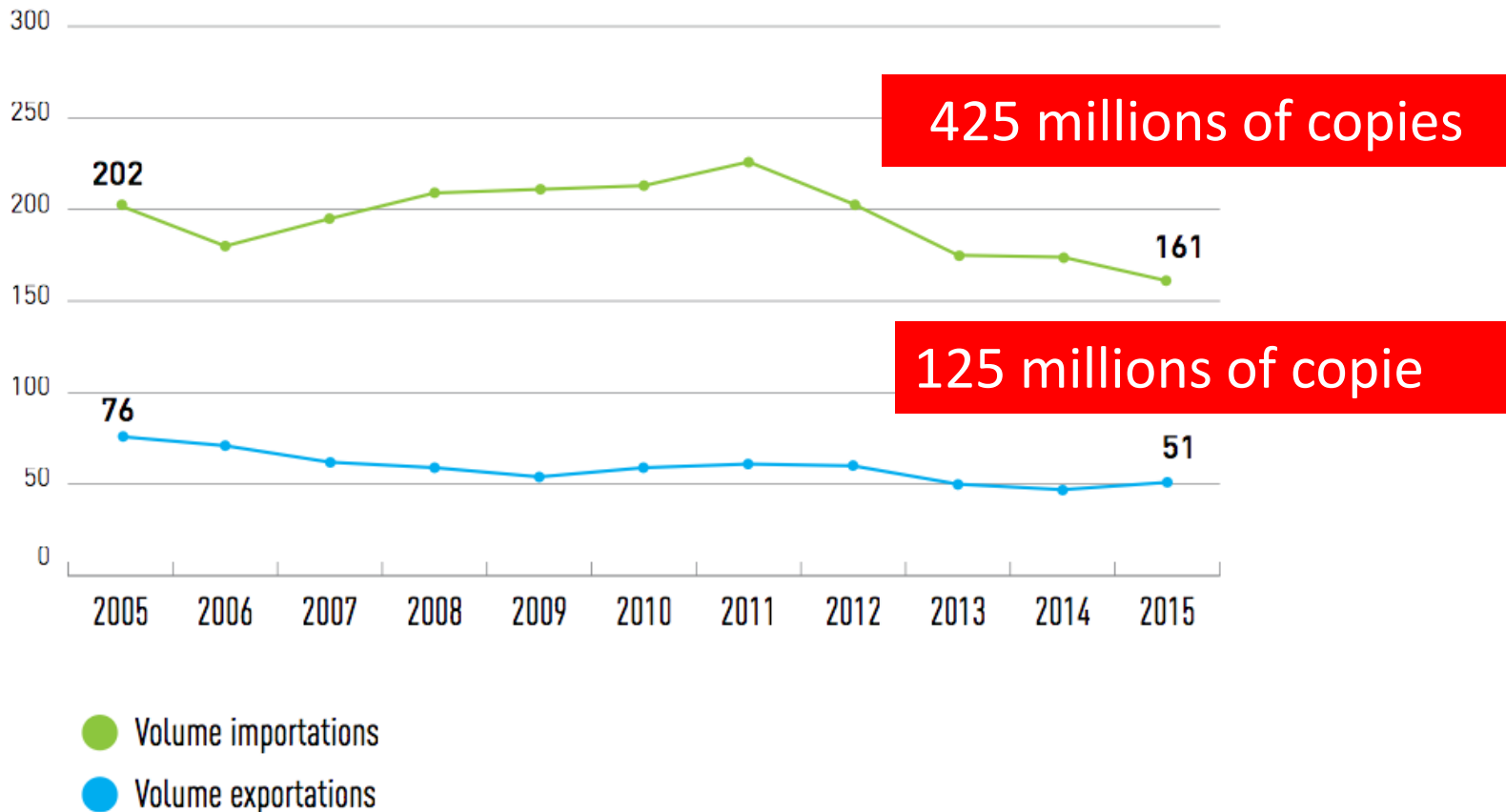


2016= 46000 employees

Without the packaging and newspapers employees

Import/Export of books and commercial print

Livres - Évolution des volumes des échanges (unité: kt)



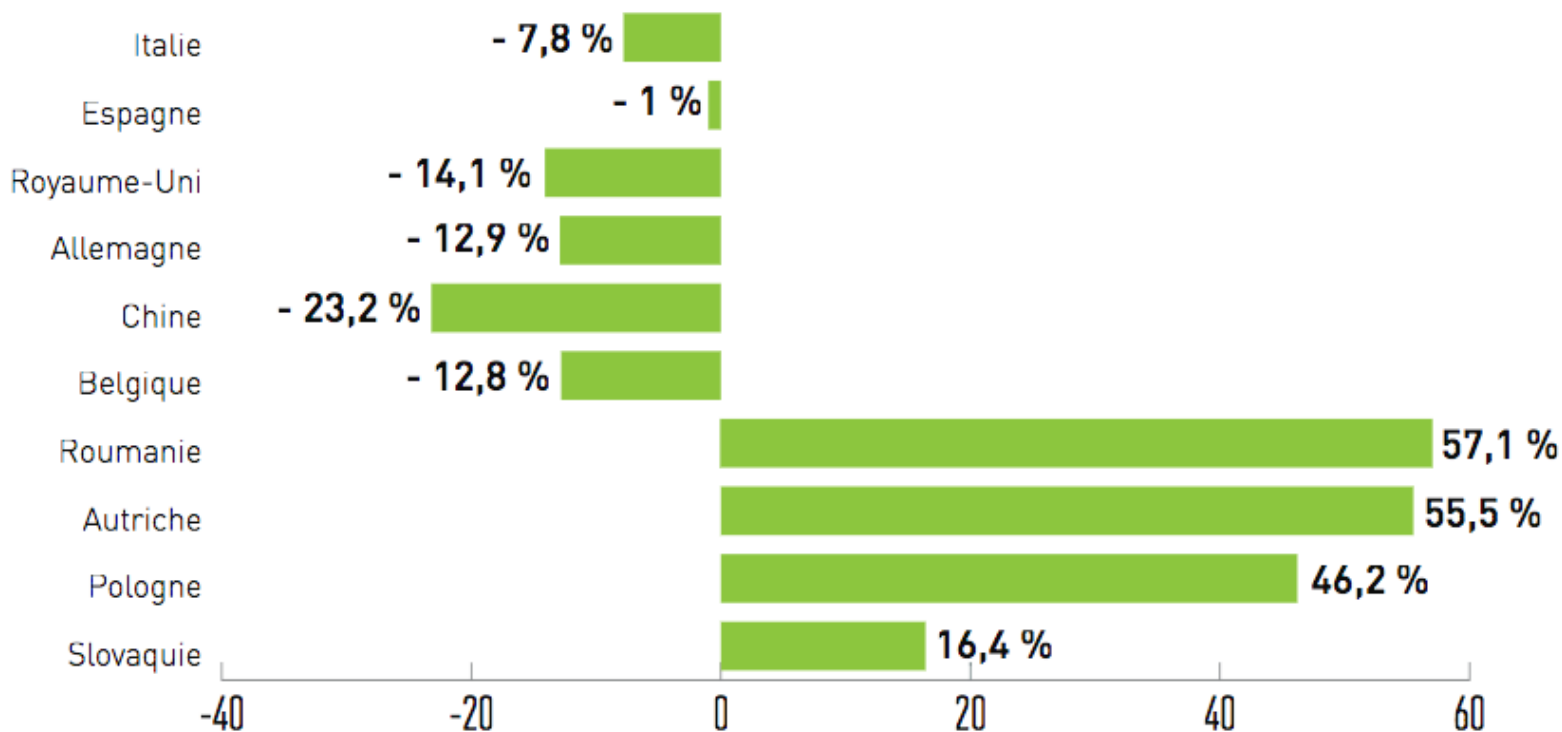
International trade with France for books & commercial print

Provenance et destination des échanges d'autres livres et brochures
(volumes 2016 vs 2015)

Importations	Volume (t)	Variation %	Exportations	Volume (t)	Variation %
Italie	40 004	23%	Belgique	12 107	1%
Espagne	31 089	27%	Suisse	6 115	-16%
Chine	14 997	-14%	Canada	5 787	0%
Royaume-Uni	12 941	-39%	Royaume-Uni	2 441	-7%
Allemagne	11 190	0%	Allemagne	2 356	-34%
Belgique	6 948	20%	Espagne	1 815	18%
Pologne	5 827	129%	Maroc	1 572	10%
Roumanie	4 554	26%	Italie	1 077	-1%
Slovaquie	2 970	-9%	Algérie	1 060	-3%
Hong Kong	2 600	232%	États-Unis (EUAN)	793	-5%

Partenaires commerciaux

Livres - Importations - Évolution 2015 vs 2014 des échanges avec nos principaux partenaires



THE CHALLENGE

For the printers

- How to efficiently produce in the right quantities at the right place at the right time without the publishers having millions of dollars of working capital locked in unnecessary stocks?
- How to help publishers to focus more on finding authors and marketing titles rather than dealing with printing and distribution?

The book market at a glance in western Europe

27,000

publishers¹

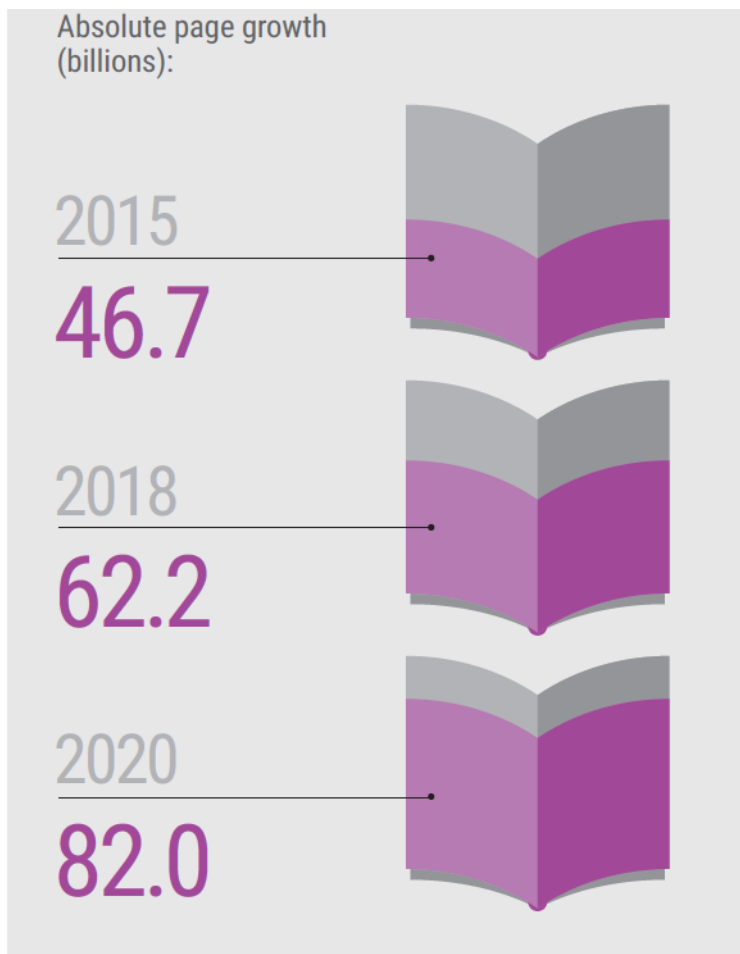
2.5 billion
units²

€22.3

billion in revenue³

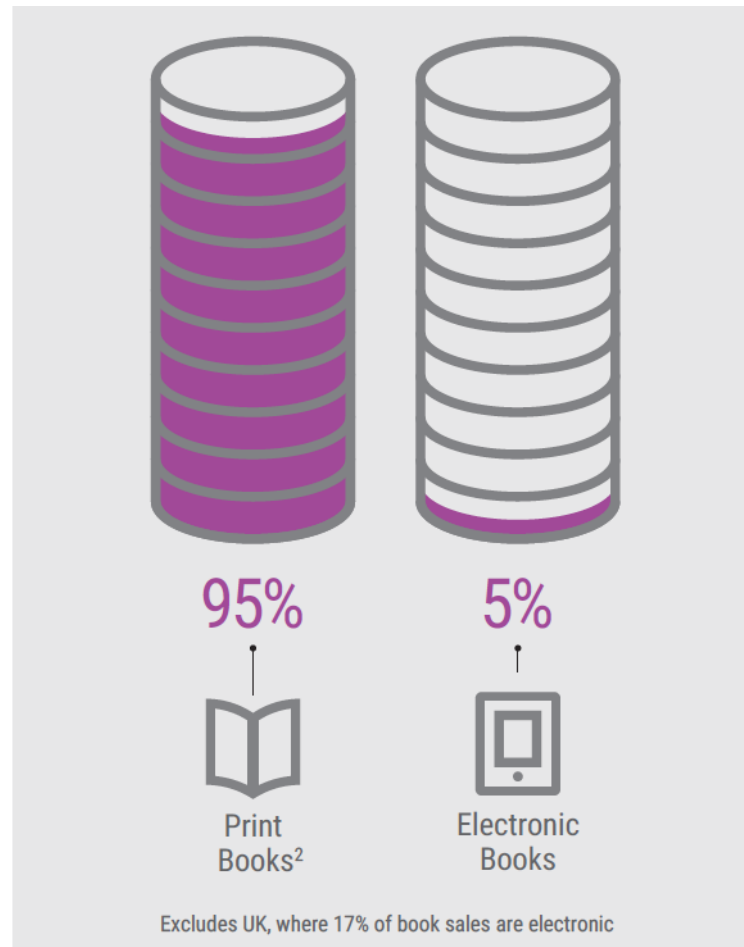
Eurostats, 2011

Astronomical growth in book printing pages in western Europe



Eurostats, 2011

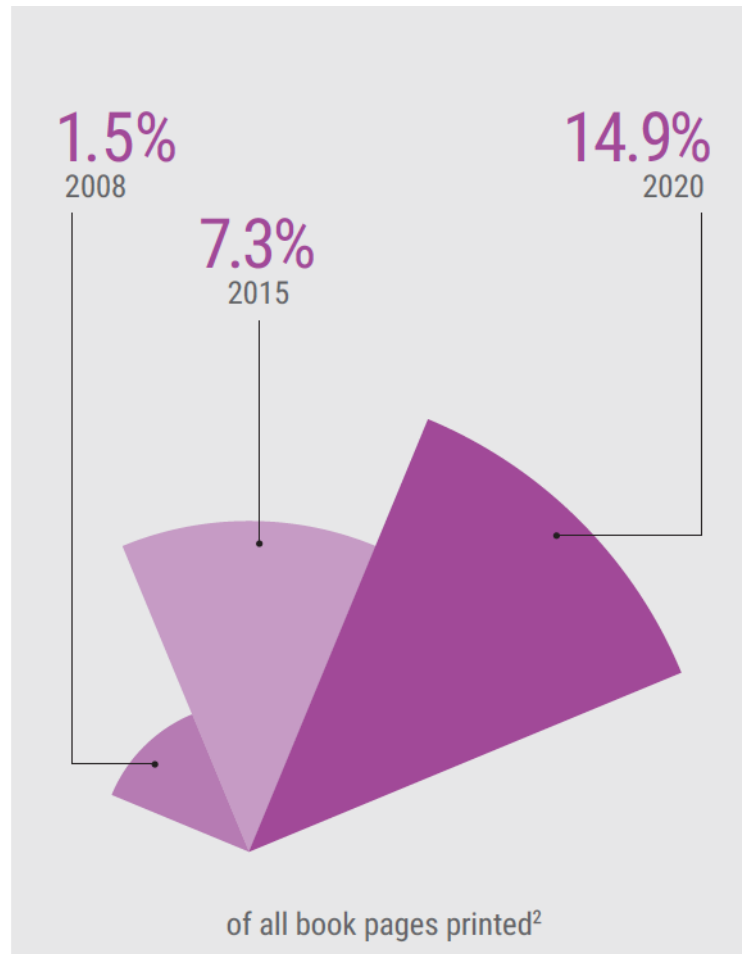
Print is the overwhelming source of revenue for book publishers*



Source :Xérox / Neomedias 2016

*Excludes UK, where 17% of book sales are electronic

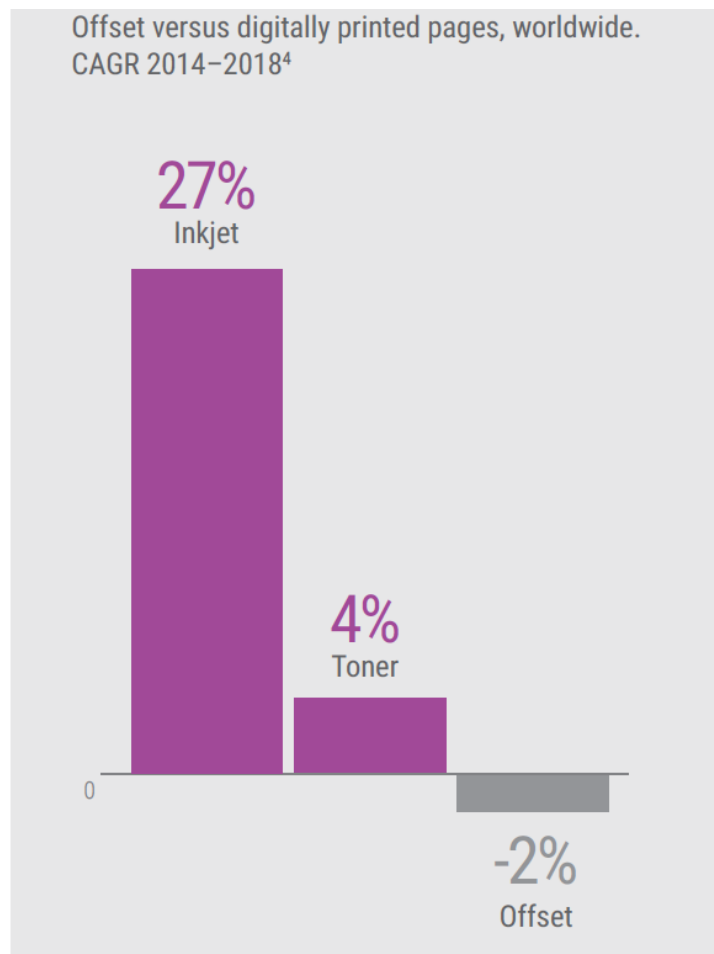
Digitally-printed pages are growing*



Digital Book Printing in Europe: Market Analysis & Forecast (2015–2020), Interquest, 2015

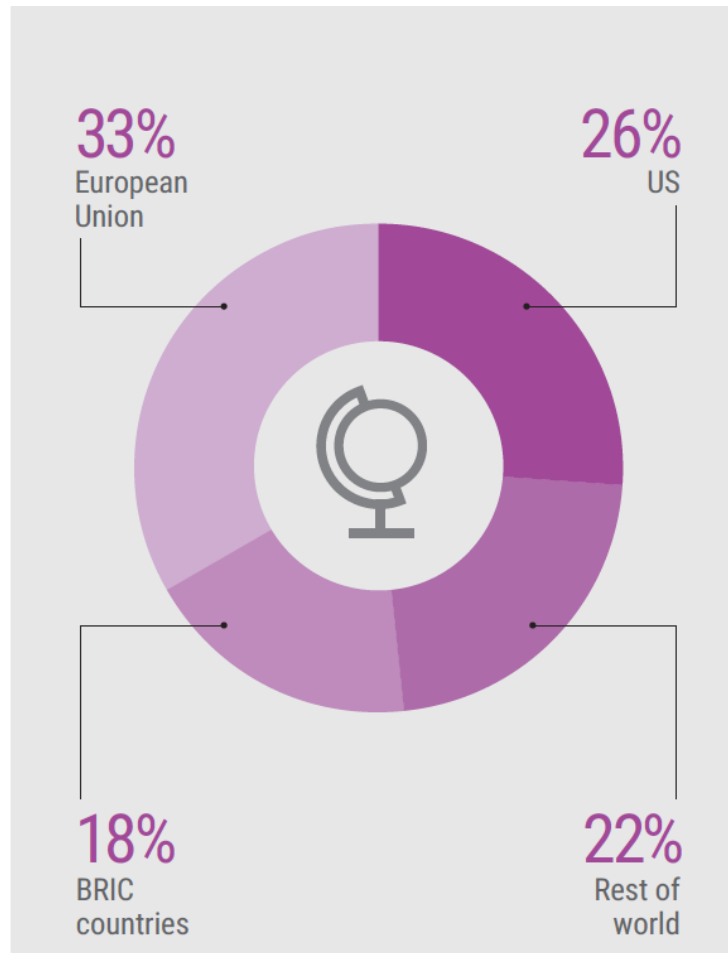
* of all book pages printed

The rise of inkjet



Source :Xérox / Neomedias 2016

Country shares of market



Source :Xérox / Neomedias 2016

* of all book pages printed

Print run segmentation and tools to stick to the demand

- 10000 copies. :

- 2 x 5000 (2012)



(Massification)

- 5 x 2000

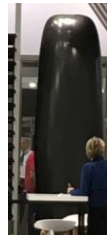


- 10 x 1000



- 20 x 500

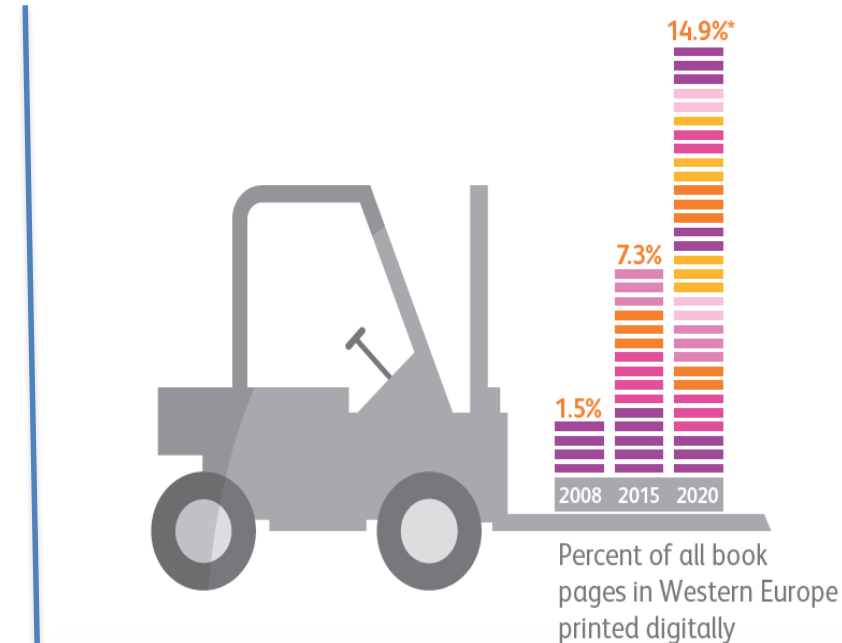
- 50 x 200



- 100 x 100

- 1000 x 10

- 10000 x 1 (2020)



(ePac, Amazon, EBM, autres?)



***A joint venture project
between the publishers (SNE)
and the printers (UNIIC)***

**An Electronic Data Exchange (EDE)
program between actors in the
french book manufacturing industry**



ClicEdit : problem and context

- Reduced of print runs
- Increased of administrative costs
- Widely used computer tools
- Maturity of the actors
- Recommended by the French Government and UNIIIC regarding he future of books production in France

ClicEdit philosophy

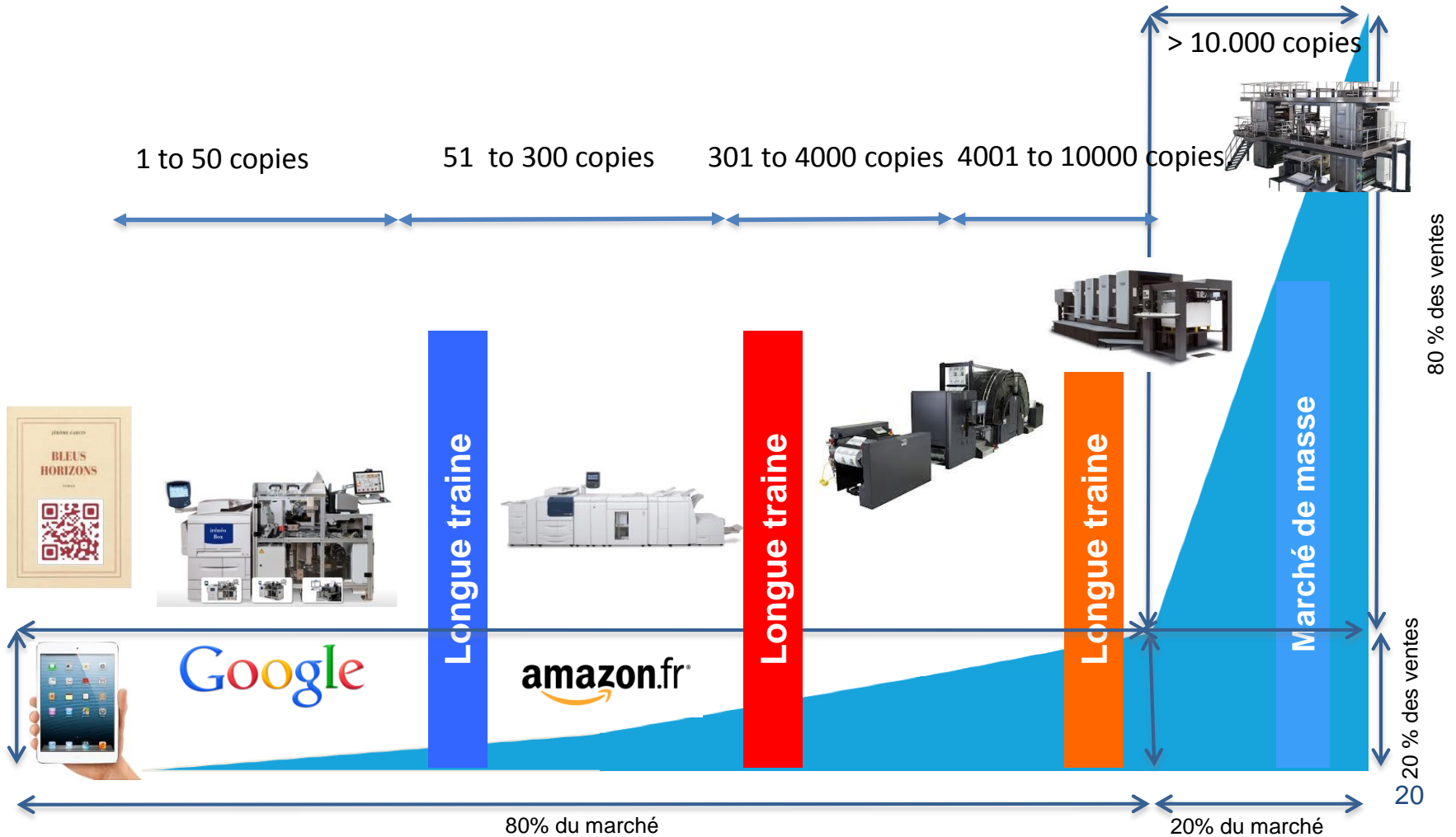
- Project driven by the french actors in the book manufacturing industry
- All actors are concerned by the project regardless their size and occupation
- Pragmatism and simplicity of use
- Experts in the field are mobilized for the benefit of the whole sector



ClicEdit goals

- Within two years, a common structured language for all main exchanges.
- Open, interoperable language that can be used by both by small and large players.
- A language available to the ERP software publishers for a better integration in the printer supply chain.

Print run segmentation and tools to stick to the demand



Print run segmentation and tools to stick to the demand

EPAC

De 1 à 10.000 ex.



1 to 50 copies

51 to 300 copies

301 to 4000 copies

4001 to 10000 copies



> 10.000 copies



80 % des ventes



Longue traîne



Longue traîne



Longue traîne

Marché de masse

20 % des ventes



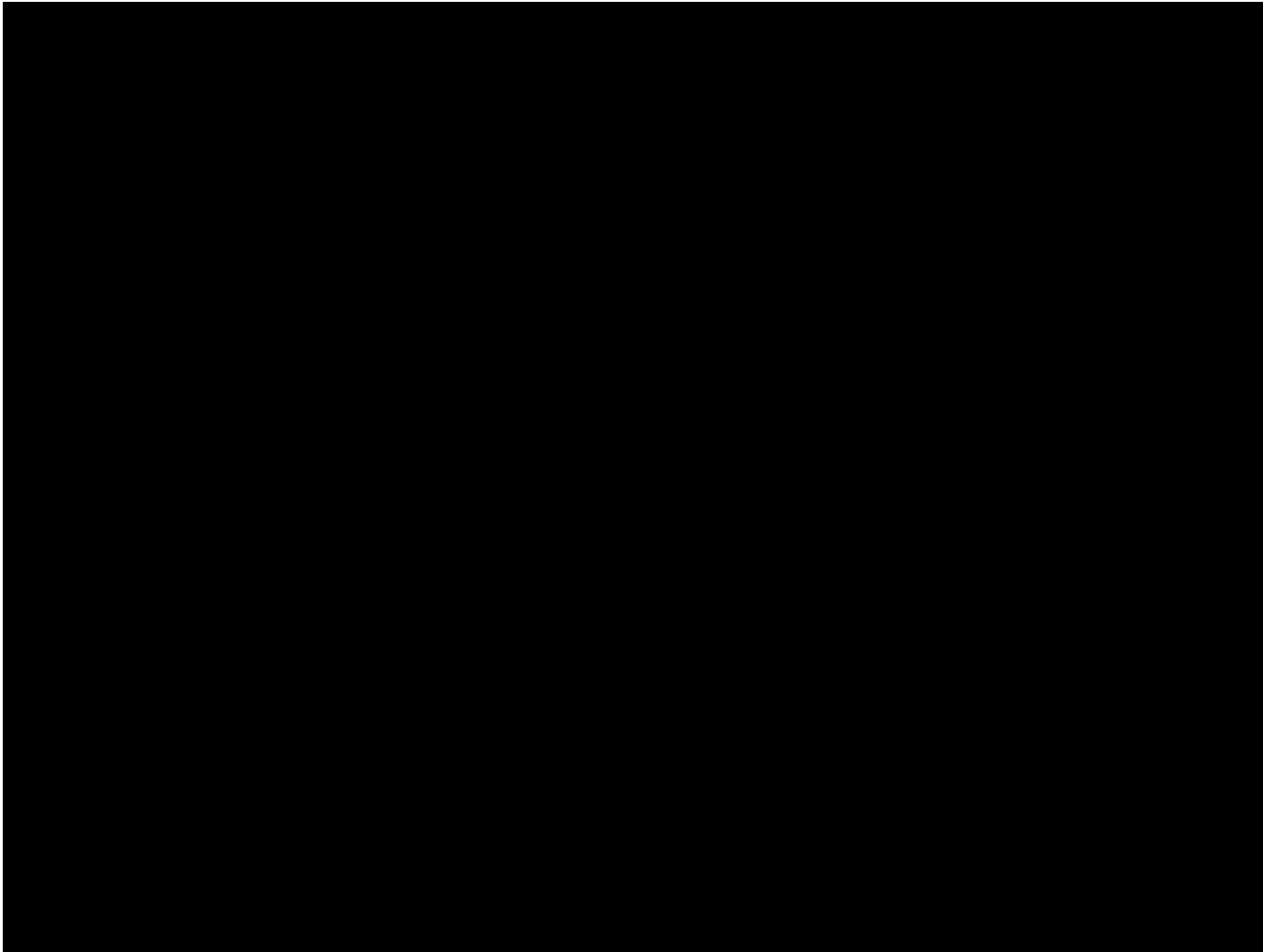
Google

amazon.fr

80% du marché

20% du marché

Does publishers or printers not using ePAC technology should become irrelevant?



Fast increase of the pocket book market share in France

50% to 70% of the volumes (litterature) and 35% of the global market

Top 2016

Le poche comme booster

créativ' ⁴
cross-média



11 000
exemplaires



383 000
exemplaires



Fast increase of the pocket book market share in France

50% to 70% of the volumes (litterature) and 35% of the global market

Top 2016

Le poche comme booster



38 000
exemplaires



1^{ère} année :
400 000
exemplaires



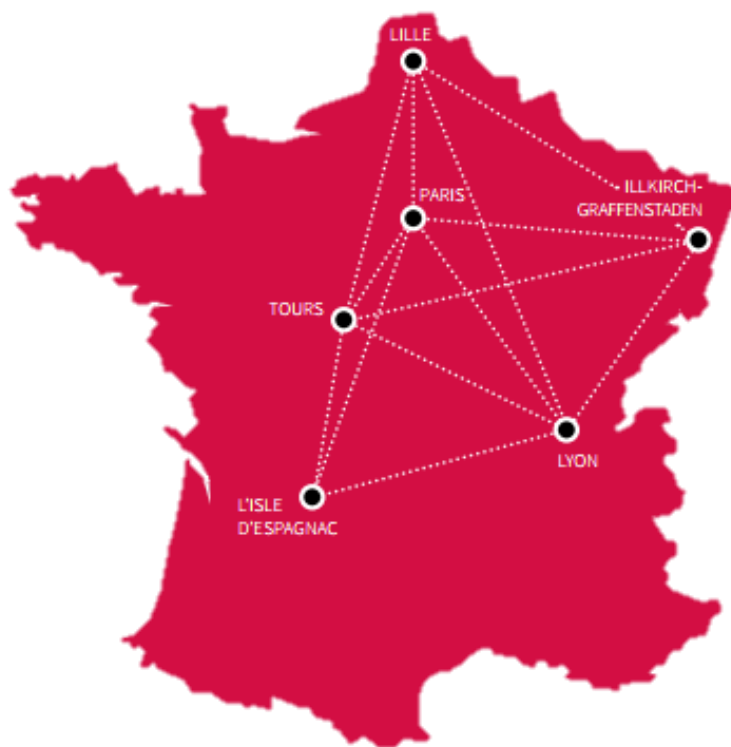


Réinventons le livre. Repensons ses usages.

When the printer is producing at the point of sales

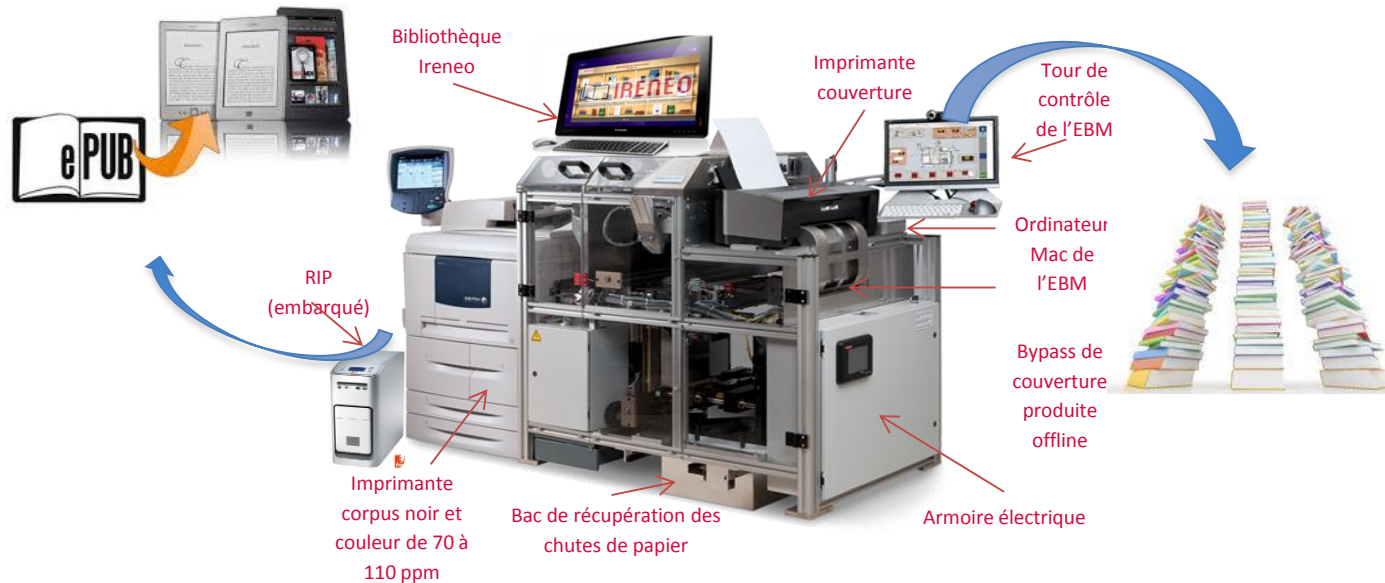
Toward a « Netflix » of paperback books in France?

4.8 minutes for a book against 48 hours for Amazon...





Réinventons le livre. Repensons ses usages.



REVITALIZATION OF TERRITORIES

assumptions : For each robot in retail = 1 to 2 jobs created or preserved.
Of the 25,000 book outlets in France, 15,000 shops are operating a regular book sales business. IRENEO could generate 15,000 to 30,000 new or preserved jobs in France.

IRENEO in R&D in Printing Schools

Lycée Bayet CARTIF - Tours





IRENEO in R&D in a bookstore

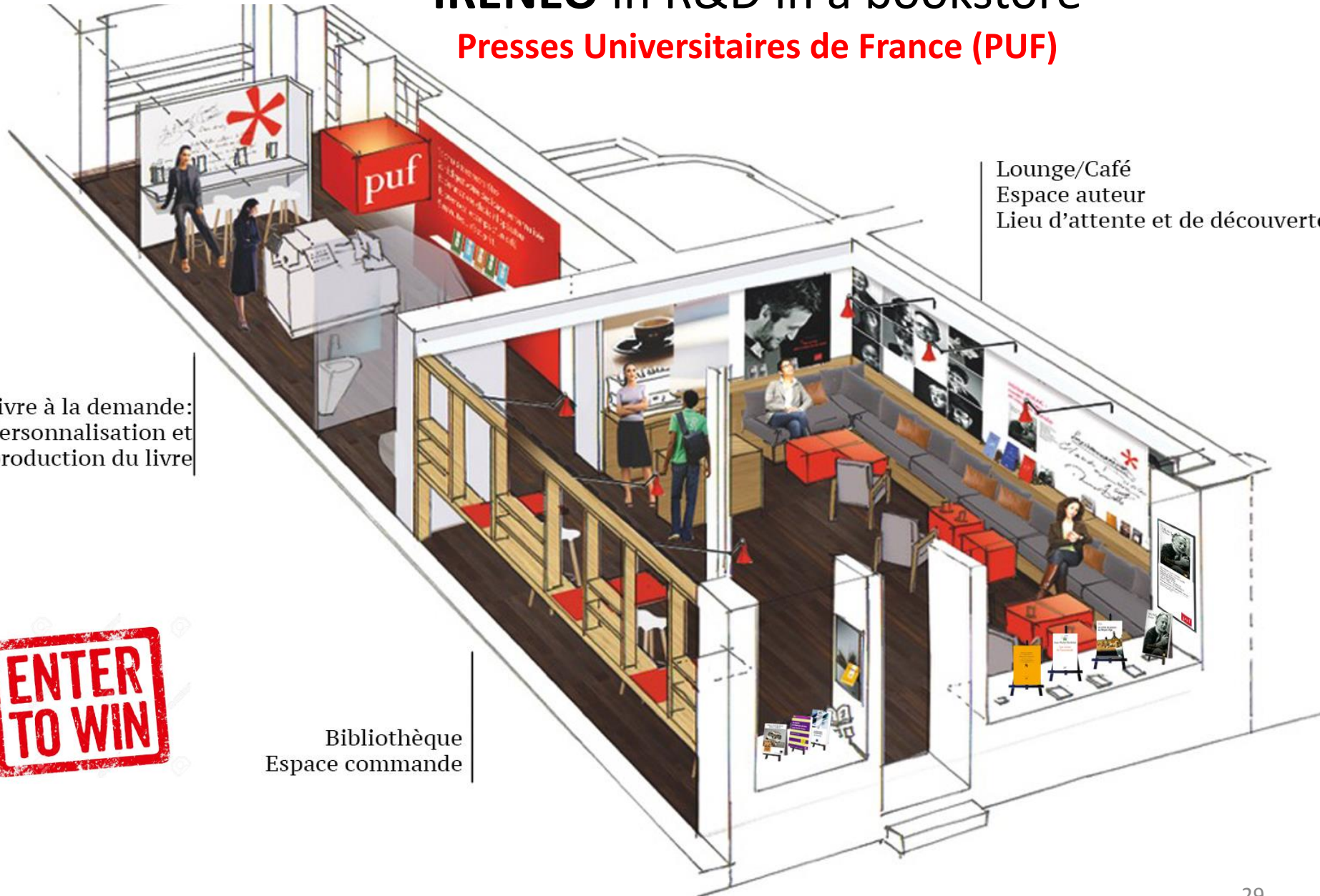
Presses Universitaires de France (PUF)



Adresse:
60 rue Monsieur Le Prince
75006 Paris
Lundi : 14H00/19H00
Mardi au Samedi : 10H00/19H00

IRENEO in R&D in a bookstore

Presses Universitaires de France (PUF)



Lounge/Café
Espace auteur
Lieu d'attente et de découverte

Livre à la demande:
Personnalisation et
production du livre

Bibliothèque
Espace commande

**ENTER
TO WIN**

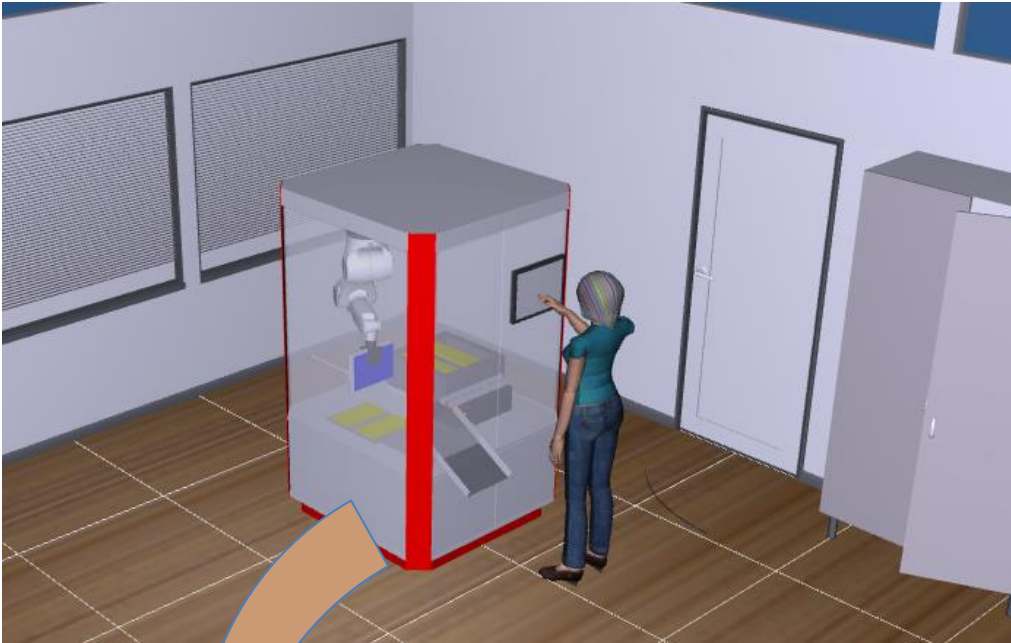


When the printer is producing at the point of sales

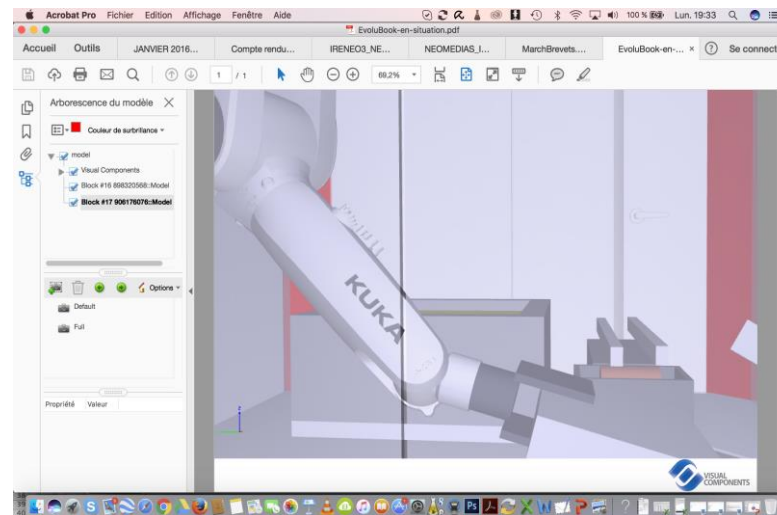
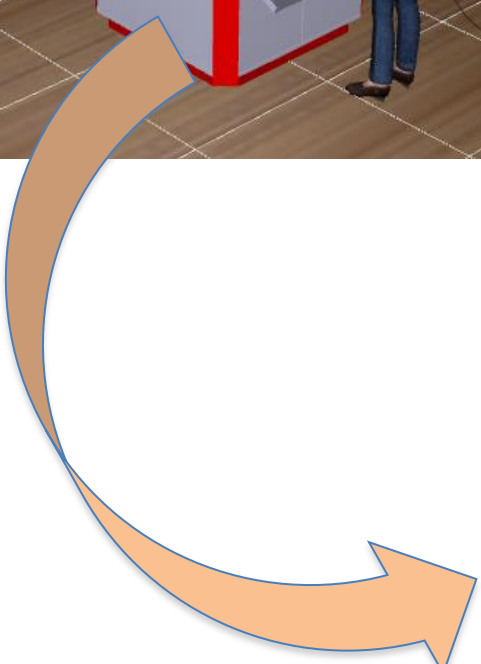
New book shop in Paris prints books on demand

Vidéos apparentées

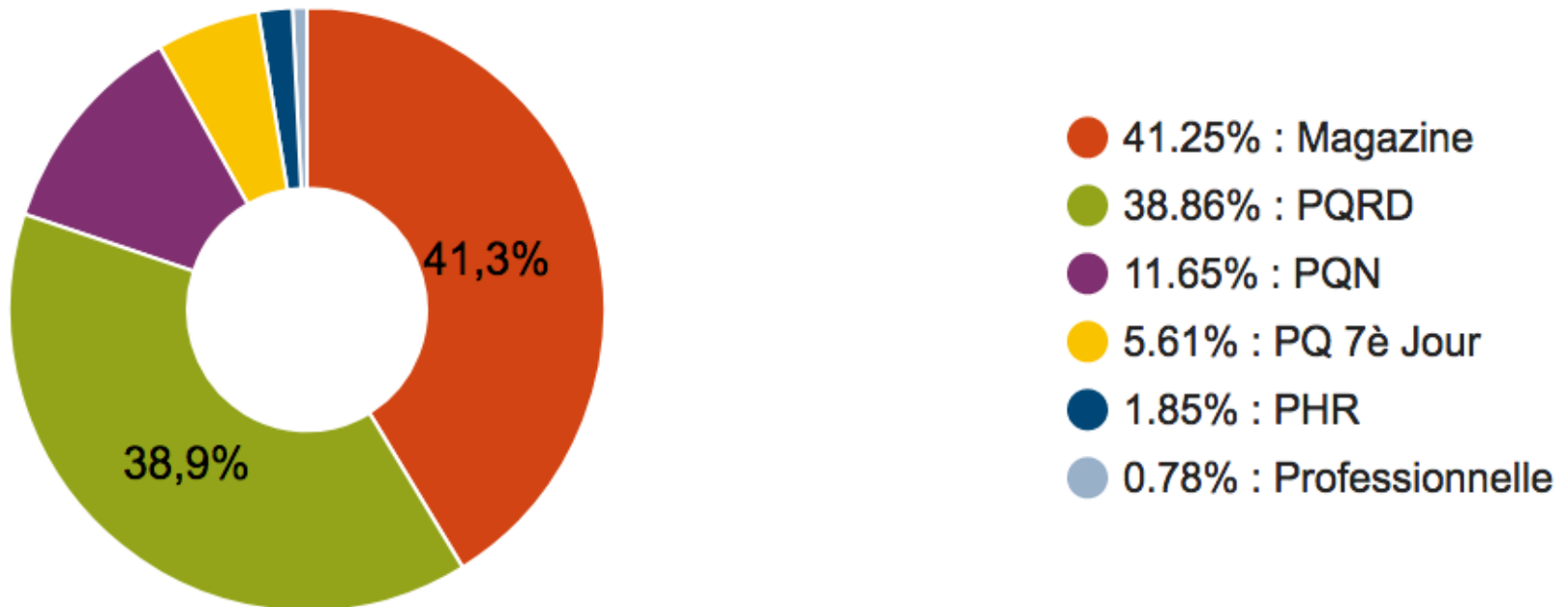
Lire automatiquement la vidéo suivante



EVOLUBOOK R&D PROJECT
A french manufactured robot
for books and magazines.
First prototype : mid-2018



Newspapers and magazines market shares





Newspapers and magazines inkjet production

2 possibilities

- full inkjet machine (runs < 15000 copies/day
- inkjet heads plugged to offset > 15000 copies/day



HYBRID
OFFSET/INKJET



Offset = mass production
Inkjet = subscribers



Newspapers and magazines inkjet production



Districts	7
Legislative districts	14
Townships	77
Towns	895

Digital printing allows to create as many versions as there are towns...



Newspapers and magazines inkjet production



1

The publisher's requirements

- Each reader is unique
- Each advertiser is unique
- Each prospect is unique
- Zero waste, zero stock
- maximum efficiency

2

Additional needs for the publishers

- Segmentation of contents
- Adapt print runs on a daily based
- Innovate with personalization
- Giving readers a say
- Offset quality at offset price

3

Questions printers should ask to themselves

- Does my current tools are fitting the market requirements ?
- If not what are the available and cost effective solutions?
- What is my job? What is my market? Does my staff is well trained
- Old costs / new costs / Pedagogy with my customers
- Price / speed / Proximity / Quality
- In which technologies to invest to stay alive (inkjet as a necessary evil)

CONCLUSION

1

Become a Relevant Player

➤ **Evaluate** production inkjet technologies. As trade book publishers embrace inventory management models, these solutions improve the economics of digital print, allowing book printers to move a greater amount of work from offset to digital platforms. This flexibility will improve both overall plant efficiency and bottom-line profitability.

2

Develop and Grow Services Around Customers

➤ **Work** with existing publishing customers to identify how digital print production can help them overcome key challenges, then scale the solution to others. Remember to educate your customers on how technology can improve the delivery of client messages and profits.

3

Start with the End in Mind

➤ **Consider** customer requirements and finishing options when making investments in digital printing devices. Finishing is an integral part of print production but it usually remains below the radar.

4

It's All About the Workflow

➤ **Assess** your current workflow and its ability to serve book publishers. Consider how workflow automation technology can help you lower per-unit costs so the volume of books produced doesn't influence costs.



Thank you for your attention

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