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Second drupa Global Trends report: International printing sector looks to the future with surprising optimism

Initial results from the second "drupa Global Trends" report are showing sustained recovery from the recession with some surprising insights and positive feedback. The full report designed to highlight economic and operational trends in the worldwide print sector is available at the end of March. The results are all the more interesting as the survey itself, conducted in October 2014, was largely identical to the first "drupa Global Trends" report from February 2014. In addition this year a full survey was conducted amongst industry suppliers for the first time, ensuring a balanced picture of the global print market. Developments and important key data from the worldwide print sector – such as financial conditions, business climate, investment plans and technologies used are given in detail and trends revealed.

Werner Matthias Dornscheidt, Chairman of the Messe Düsseldorf Management Board summarises the key results of the study. "The generally upbeat picture reported by the expert panel surprised us," says Dornscheidt. "Both the print service providers and the international supplier industry gave a positive evaluation of the economic situation of their own companies as at October 2014. Even more surprising, however, was that the print and supplier industry is heading into 2015 with a very positive outlook."

The question 'How do you see the outlook for the coming twelve months?' was answered by 48 percent of service providers surveyed with expectations of an improvement in their companies' economic situation, and only seven percent with a decline. The results

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from the worldwide supplier industry were similarly positive: 51 percent forecast an improvement, and only eight percent a decline.

On the other hand, the results from individual performance measures surveyed show a much more mixed picture:

1. **Sales for print service providers continue to rise – but are less pronounced.** 39 percent of print service providers report an increase, whereas 22 percent show a drop in sales. This positive balance of 17 percent is well below the positive net balance of 27 percent from the first survey.
2. **The margins for print service providers continue to fall.** Almost half (43 percent) of the print service providers surveyed report falling margins, while just 16 percent succeeded in increasing margins. Positive exceptions here are the markets of North America and the Middle East, where 29 and 28 percent reported increased margins.
3. **Digital print is growing fast but is still a small percentage of turnover for most printers.** As quickly as the share of digital printing in the overall print technology mix continues to rise, most turnover continues to be generated from traditional print. Only ten percent of the print service providers surveyed achieved more than 25 percent of their 2014 sales in digital printing (2013: 8 percent).
4. **Print service providers are not turning to services outside the print sector.** Often recommended as a new business area – but not yet realised in practice: Just 27 percent of the print providers surveyed achieved more than ten percent of their sales with services outside the print sector (e.g. asset management for customers, updating databases, etc.).

Drawing an initial conclusion from the second "drupa Global Trends" report, those surveyed feel pretty positive – even if some measures are still showing negative trends. This general optimism is supported by the investment plans cited both by print service providers and supplier firms. After all, only a forward-looking development strategy ensures a competitive edge and thus the future of the company.

More than 1100 international decision-makers from the print industry and their suppliers responded to the comprehensive survey in October 2014. The independent market research company Wissler & Partner (Switzerland) and Printfuture (UK) have – as with the first "drupa Global Trends" report and the first "drupa Global Insights" report – expertly evaluated and prepared the results. At the end of March the Executive Summary will be available as a free download in seven languages (English, German, French, Spanish, Portuguese, Chinese and Russian) as well as the entire version incl. the full figures in English for a price of EUR 249.00 online at www.drupa.de.

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