EuPIA, the European Printing Ink Association, working under the umbrella of CEPE, represents and protects the common interests of the European printing ink business and promotes the image of the industry to the public. EuPIA provides a forum for discussion and decision-making regarding issues of specific interest to the printing ink industry. EuPIA members also participate in CEPE working groups dealing with issues of general interest to the wider CEPE membership.

Market Statistics 2012
EuPIA publishes market statistics on an annual basis. The data can be accessed via the EuPIA website at eupia.org, section publications – statistics.

The aggregated figures displayed in the charts below summarize:
- Value per country total, per category European and Europe total
- Volume per category for Europe total

The figures comprise domestic ink data collected for 34 countries or country groupings in Western and Eastern Europe and represent the activity of 28 EuPIA members participating in the statistics.

It is believed that this represents overall in excess of 95% of the total European market.

The global ink categories for which the aggregated figures are displayed, are defined as follows:
- Liquid inks, water borne (includes flexo and gravure inks, technical varnishes, extenders, primers, and overprint varnishes)
- Liquid inks, solvent borne (includes flexo, gravure and publication gravure inks, technical varnishes, extenders, primers, and overprint varnishes)
- Oil based inks (includes coldset and heatset offset as well as conventional sheetfed offset inks)
- All other inks

Key Sales Value by country (€000) Year end December 2012

![Graph showing market statistics for 2012](image-url)
Announcement of the 11th EuPIA Annual Conference in 2014
The next Annual Conference will be held on 27th/28th March 2014 in Lisbon (Portugal).

Launch of revamped EuPIA Website
In December 2012, EuPIA proudly announced the launch of its revamped website www.euapia.org. The design, structure and functionality had been optimized for enhanced user-friendliness. Visitors will experience a clearer structure offering easy access to relevant information, simplified navigation and improved search functions which all will make finding information easier than before.

The website provides information to the press, statistical material as well as a comprehensive library of technical documents on all aspects of the manufacture and supply of printing inks and related products.

Printing Inks and Varnishes Applied on Food Contact Materials
Swiss Ordinance on Materials and Articles: Provisions for Food Packaging Inks
Switzerland — as the first country in the world — had amended its Ordinance on Materials and Articles (SR 817.023.21) with provisions specific to printing inks which are designed to be applied on the non-food contact surface of food packaging. The core element of the regulation is a list of "permitted substances", identifying the only substances which may be used in the manufacture of these food packaging inks marketed in Switzerland. This list, which has been established with the support of EuPIA, is regularly revised; the fourth edition of the list was published in December 2012 and entered into force on 1st April 2013 (http://www.bag.admin.ch/themen/lebensmittel/04867/10015/index.html?lang=en).

The Swiss competent authority takes a pragmatic approach with regard to the enforcement of the Ordinance: Substances, for example, which are not included in the official lists, may be used provided that a substance dossier containing the required data has been submitted to the authority, and the notifier has received confirmation of receipt of the dossier.

As this piece of legislation is quite complex and can be prone to misinterpretation, EuPIA provides guidance documents in a dedicated section of its public website. In particular, a FAQ document, published jointly by the Swiss Federal Office of Public Health and EuPIA, addresses relevant issues regarding substance evaluation and detection limits.

German Ordinance on Materials and Articles: draft amendment specifying requirements for printing inks applied on food contact materials
The German Consumer Protection Ministry had been inspired by the Swiss example. Although the European Commission has started an initiative for EU harmonized regulatory approaches to non-plastic food contact materials including printing inks, Germany apparently believes that the EU process is too slow and therefore exercises the option of adopting a "national specific measure" for printing inks applied on food contact materials. It is intended to implement this measure through an amendment to the German Ordinance on Materials and Articles, the so-called "Printing Ink Ordinance".

EuPIA and the entire food packaging chain are generally open to appropriate regulations enhancing product and process safety in the complex supply chains, as well as improvements of health related consumer protection, if justified by objective needs. For many reasons, EuPIA and the entire food packaging supply chain hold the firm view that a separate national approach in this field is
not a suitable instrument to achieve the objectives, and therefore call on the German legislator to stop this national initiative and to support the EU Commission in developing suitable Community rules for inks and varnishes for food contact materials. The Swiss and draft German Ordinances appear to be similar at first glance, but are quite different on closer examination. Like the Swiss piece of legislation, the draft German Printing Ink Ordinance is based on the positive list principle. However, as the definition of printing inks foreseen in the draft is very broad, no differentiation is made between printing inks applied on the non-food contact surface of food contact materials and those inks that are intended to come into direct contact with food: different from the Swiss approach, both types of inks are intended to be in scope of the German Ordinance. In detail, the resulting coverage of the scope would be:

- Printing inks for surface and sandwich printing
- Printing inks for intentional direct food contact
- Printing inks for transient food contact (e.g., napkins, place mats, paper plates, tea tags)

These categories each imply migration scenarios which are fundamentally different from one another, resulting in different approaches for assessing the related risks. Therefore it is absolutely necessary to consider these categories separate from one another, and also to treat them separately in legal terms. So far, the industries’ objections and proposals have not been taken into consideration in the third draft of the Ordinance. As it stands, the current positive list contained in the third draft is incomplete. For example, it does not at all consider ingredient substances of printing inks for transient food contact, which would lead to a complete marketing ban on inks and varnishes for these applications, if the draft ordinance would become applicable as of now. Despite its fundamental criticism of the German approach, EuPIA is compiling information enabling the establishment of substance lists for each of the ink/varnish categories described above. EuPIA is grateful to be supported in this effort by partner organisations representing the raw material supply industry, such as CEFIC FCA (Food Contact Additives Sector Group), ESIG (European Solvent Industry Group) and RadTech Europe.

**EuPIA Technical Committee**

Technical issues and non-food applications of printing inks are managed by the EuPIA Technical Committee (ETC) and its subsidiary working groups, Operational Safety & Risk Assessment (OSRA) and Labelling and Safety Data Sheets (LSDS). In the last 12 months these groups have adopted improved decision-making procedures, for example for document approval.

**EuPIA Exclusion List**

The Exclusion List for Printing Inks and Related Products is one of EuPIA’s key public commitments to safer operations and products: it represents a voluntary ‘prohibition’ of the most hazardous raw materials, including those which are (very) toxic or are carcinogenic, mutagenic or toxic for reproduction. The 8th edition of the Exclusion List was published in November 2012, along with an update of the accompanying members-only Explanatory Note. Members highlighted a need for better communication when
substances come within the scope of the Exclusion List due to reclassification. EuPIA will follow the procedure shown in the figure, in which the National Associations play a vital role in conveying information from and to the membership.

Sector-specific guidance on key issues

For a number of common issues, which are dealt with by CEPE groups and described elsewhere in this Annual Report, ETC often develops specific positions and additional guidance tailored for printing ink manufacturers or their customers:

- **Toy safety**: EuPIA's position statement on the suitability of inks and related products for this application was updated in October 2012, and will be revised once more after the new chemical safety requirements take effect in July 2013.

- **Biocides**: inks, varnishes or auxiliary products containing preservatives will be 'treated articles' under the new Biocidal Products Regulation (see separate article). The CEPE guidance is equally valid for printing inks, but an additional EuPIA explanatory communication has been prepared for printers.

- **Environment and sustainability**: an information note "Environmental Impact of Printing Inks" was published in March 2013 and is being used in dialogue with printers’ associations; translations are progressing with the help of National Associations. The EuPIA statement on renewable materials is being updated. EuPIA also monitors relevant issues related to the EU Ecolabels for printed materials, and assesses the potential utility to its members of the CEPE LCI database and Ecofootprint tool (see separate article).

- **Nanomaterials**: a standard customer letter was developed for use of members in France regarding the decree on declaration of these materials.

Substance-specific issues are also monitored and addressed in ETC, for example plans by the European Commission (DG TAXUD) to harmonise "euro-denaturants" for industrial ethanol. The printing inks sector is not yet directly impacted, but input is being provided pro-actively to ensure that critical denaturants are retained.

On the broad subject of REACH (see separate article), ETC contributes by reviewing the list of substances subject to evaluation and will provide input on uses in inks as needed. Besides its other work on labelling issues and developing standardised content for safety data sheets, EuPIA LDS is also the review panel for the ink use groups developed in the Generic Exposure Scenarios project.

EuPIA welcomes any initiative aimed at enhancing the recycling of recovered paper and continues to be an active member of the European Recovered Paper Council (ERPAC). EuPIA is a Supporter of the "European Declaration on Paper Recycling 2011-2015", a voluntary cross-industry commitment to a sustainable increase in paper recycling. EuPIA has co-developed and supports a number of ERPAC guidance documents, accessible via the ERPAC website at [www.paperrecovery.org](http://www.paperrecovery.org), and encourages members to submit entries to the annual European Paper Recycling Awards.

Operational health and safety

The EuPIA OSRA group supports members of EuPIA and CEPE, but also customers and downstream users, in the goal of operating at a high level of plant and occupational safety. Over the past year OSRA has continued to publish Safety Flashes and Safety Alerts on a wide variety of topics, highlighting significant incidents or risks and sharing key learning points for members with the aim to reduce the risk of a similar occurrence.

In the last 12 months OSRA has published new guidance documents on Formulation Change Management Principles and Safety of Vertical Post Mixers, and updated its Guidelines on Loading High-Resistivity Powders into Vessels Containing Flammable or Explosive Vapours. A new set of guidelines on Laboratory Safety, currently comprising 3 parts, but with plans to develop further in future, is nearing completion at the time of writing.

OSRA also gave its expert input to guidance developed by other groups, such as the CEPE Guidance for the Handling of Engineered Nano Objects in the Workplace, and has issued recommendations drawing members' attention to other valuable guidance available from raw material supplier sectors.

OSRA guidelines are made available on the extranet for use by EuPIA/CEPE members. Those intended for customers are also available on the public area of [www.euapia.org](http://www.euapia.org).
Printing ink market remains in a precarious position – no recovery before 2014

III: The headwind is picking up. Developments in the market still pose a challenge for European printing ink manufacturers. Martin Cellerier, chairman of the EuPIA’s Statistics working group, described the situation of the European printing ink market as a matter of "shrinking to survive." This year’s conference of the European Printing Ink Association (EuPIA) attracted more than 20 experts from the printing ink industry to Dublin, Ireland. Pity that the mild climate on the Emerald Isle was unable to exert any benign influence on the current economic climate in the printing ink market. As in recent years, the sector finds itself in an ongoing precarious and challenging situation. This year, the EuPIA sought to provide its members with even more comprehensive information on the printing ink market, using data culled from 28 companies, covering more than 90% of the market in nearly every segment.

Printing ink market shrinking steadily

The downward trend of recent years remains intact, with total market volume in 2012, excluding exports, down by 4.1% year on year to 1.015 million metric tons. However, by making price adjustments, the industry managed to avoid a similar reversal in total revenues. According to Cellerier’s data, the decline here was an estimated 0.8%. This means that, except for 2010, market volume has shrunk every year since 2008. And the outlook remains grim.

This worrying trend continues to hit the print media segment particularly hard. In 2012, total volume there collapsed by 6.4% year on year, the highest single decline. Thomas Luther Heusel, president of the association, predicted that print media would have to shoulder significant losses for the next ten years, with the magazine market forecast to decline by as much as 40% and newspapers by as much as 50% in the period between 2010 and 2020. Yet, it was not all doom and gloom. Packaging printing inks were relatively stable. True, volumes fell in this sector, too, but the -3.2% fall was well below the market average. Exports was the sole growth area, up 6.6% by volume and 8.8% by value.

Digital printing: hoping against hope?

Over and over again, it is being hoped that digital printing will ride to the rescue, rather like the 7th Cavalry. Unfortunately, said Pat Frost, DG Mark III, digital printing was only efficient on flat surfaces, and did not play any significant role in packaging. Consequently, it could not be expected to provide any significant volume growth. Hopes of a last-minute rescue were more of a "desperate attempt" to identify growth segments, he noted. It was difficult in these circumstances to come up with strategies on how to remain competitive and successful in a problematic business climate, such as this shrinking market. "The printing ink industry responds very sensitively to changes in the economic climate and is therefore directly affected by them. 2013 remains a challenging year, and there is unlikely to be any recovery before 2014," said Cellerier. This situation aptly describes the plight of the sector, which seems to be much more vulnerable to changes in the current economic climate than other areas of the paints and surface coatings industry. Specific measures on how to counteract developments were not forthcoming. Precisely in this context, the presentation by Thomas Weskamp, McKinsey & Company on "Surviving in shrinking markets" might have been expected to spread some hope. Unfortunately, illness prevented him from delivering his paper, and a replacement could not be found at such short notice.

Focus on food packaging

"Right now, however, our focus is clearly on food packaging. Naturally, we’ll continue to monitor the other regulatory issues affecting the industry," said Dr. Martin Rantt, Executive Manager of the EuPIA. The association had devised a strategic plan relating to printing ink regulation, he said. The EuPIA favoured a Europe-wide approach that sets down statutory guidelines for the sector. Stand-alone, national initiatives were not the preferred solutions, he noted. The Association would not be in a position to present any results on this until the third quarter at the earliest. The next EuPIA conference will be held in Lisbon, Portugal on 27 and 28 March 2014.

by Damir Grgic (Vfos published in ECJ05/2013)