

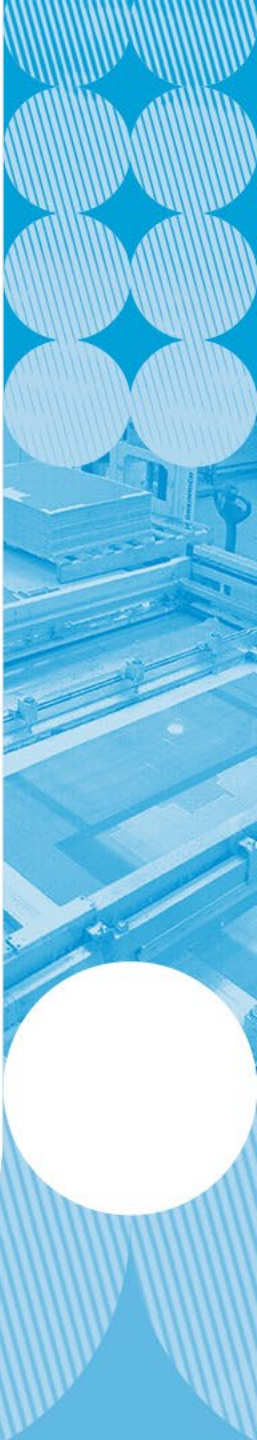
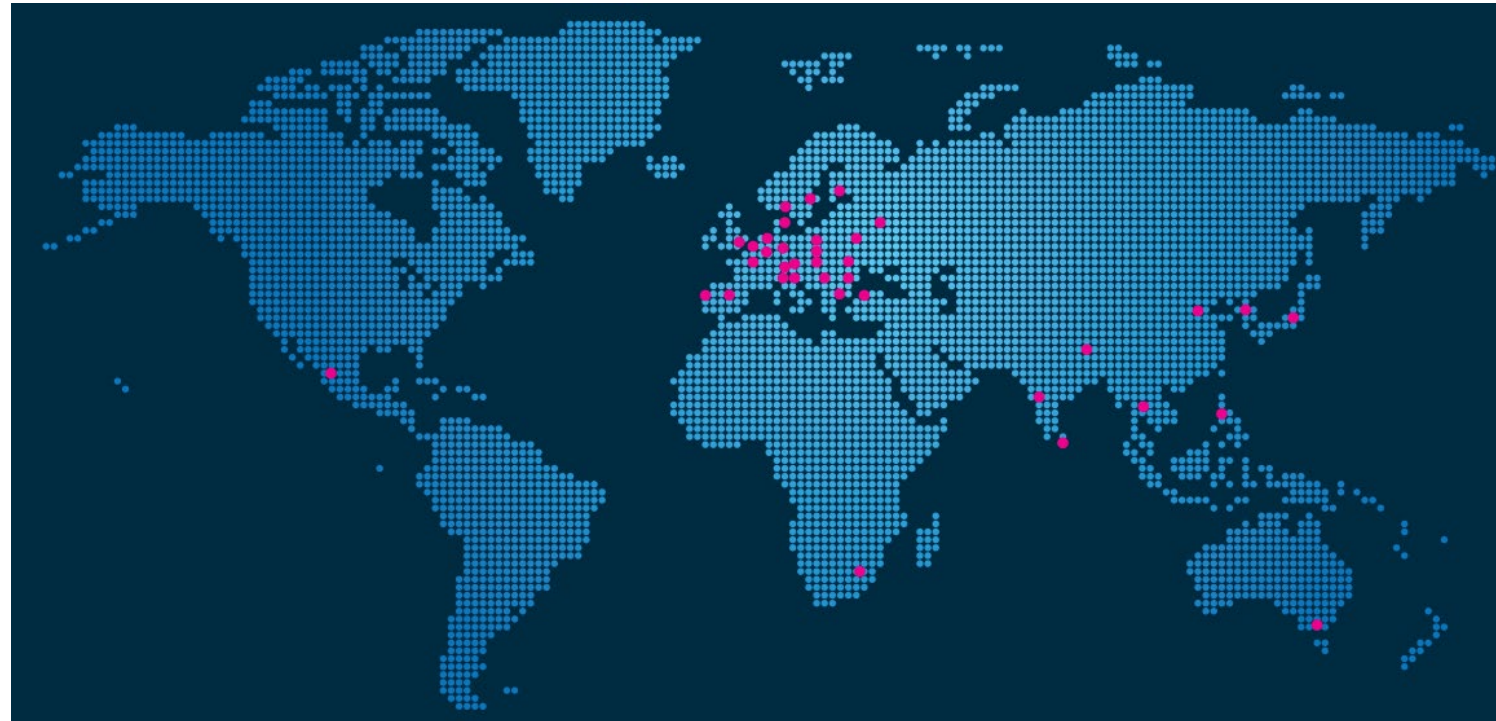
FESPA Associations End-of-Year Survey 2022

Participation

33 Associations took part in the survey

With the exclusion of

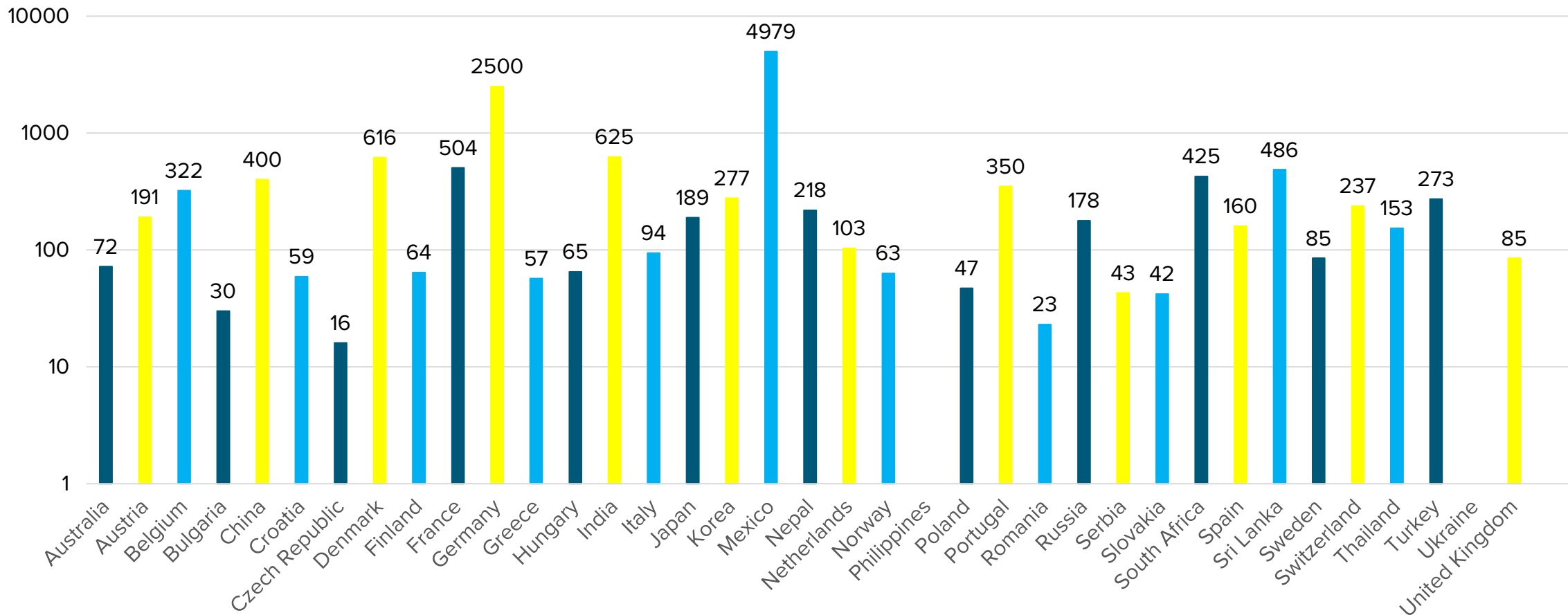
- China
- Philippines
- Nepal
- Russia
- Ukraine



Question 4

How many individual members and member companies do you have?

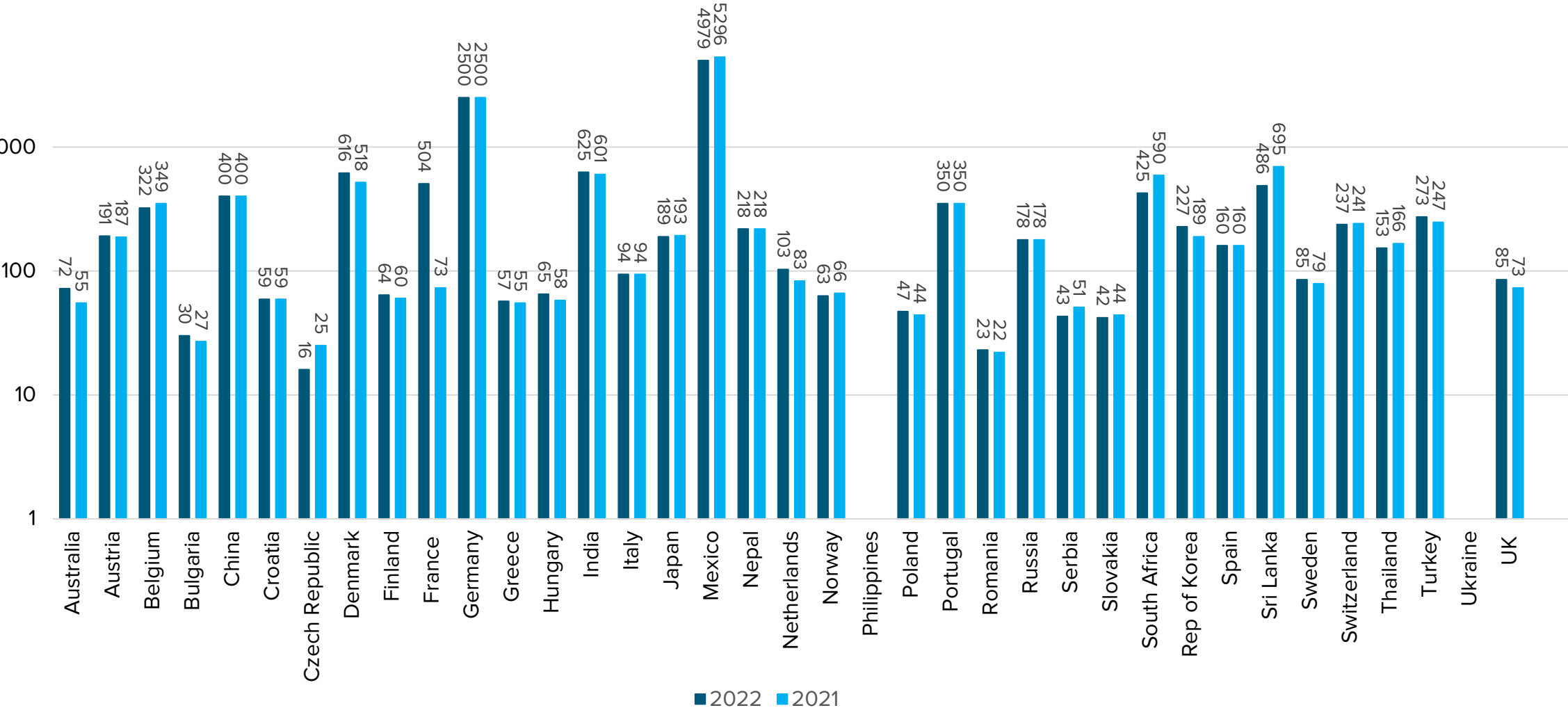
Total Members 2022



Overall membership for 2022 was **14,056** (this includes FESPA Direct memberships)

2021-2022 Membership Comparison

2021/2022 Comparison



*Please note that last year's membership data was used for China, Russia and Nepal. The Philippines and Ukraine had no data available.

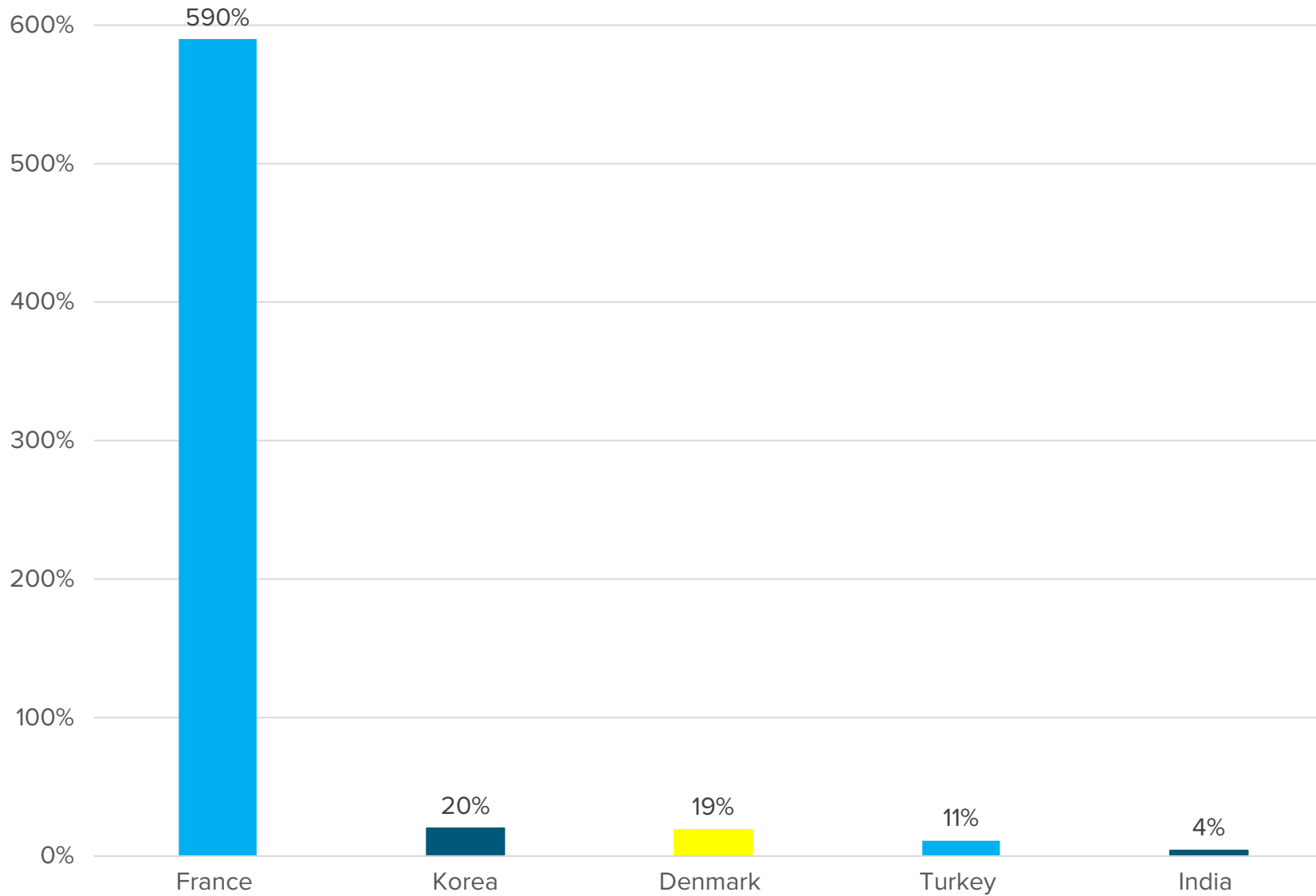
2021-2022 Membership Comparison

Association	Difference from 2021 to 2022	Total members 2022	Total members 2021
Australia	17	72	55
Austria	4	191	187
Belgium	-101	248	349
Bulgaria	3	30	27
China	0	400	400
Croatia	0	59	59
Czech Republic	-9	16	25
Denmark	98	616	518
Finland	4	64	60
France	431	504	73
Germany	0	2500	2500
Greece	2	57	55
Hungary	7	65	58
India	24	625	601
Italy	0	94	94
Japan	-4	189	193
Mexico	-317	4979	5296
Nepal	0	218	218
Netherlands	20	103	83
Norway	-3	63	66

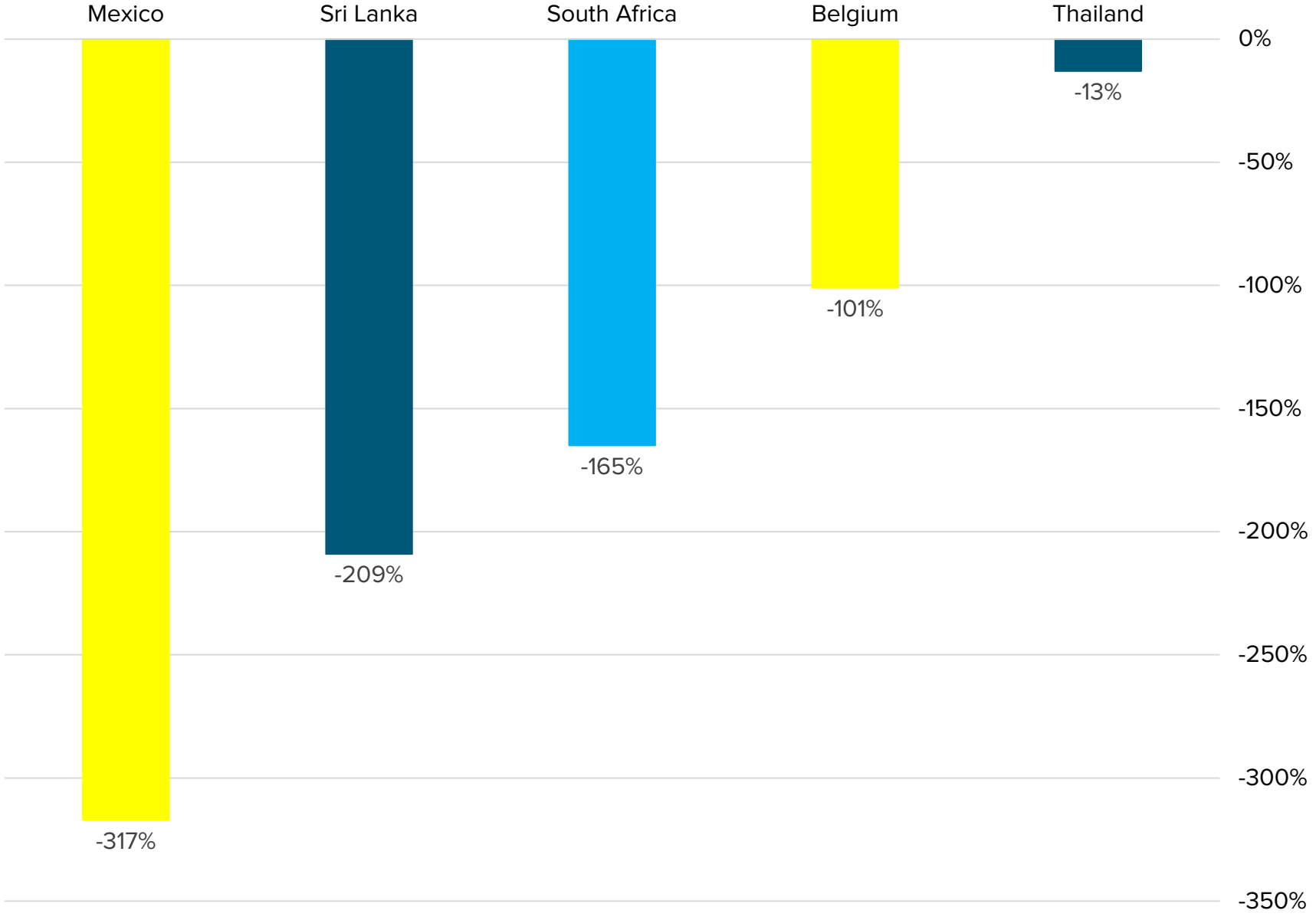
Association	Difference from 2021 to 2022	Total members 2022	Total members 2021
Philippines	Awaiting confirmation	Awaiting confirmation	Awaiting confirmation
Poland	3	47	44
Portugal	0	350	350
Romania	1	23	22
Russia	0	178	178
Serbia	-8	43	51
Slovakia	-2	42	44
South Africa	-165	425	590
Rep of Korea	38	227	189
Spain	0	160	160
Sri Lanka	-209	486	695
Sweden	6	85	79
Switzerland	-4	237	241
Thailand	-13	153	166
Turkey	26	273	247
Ukraine	0	0	0
UK	12	85	73

*Please note that last year's membership data was used for China, Russia and Nepal

Top 5 increases in membership 2022

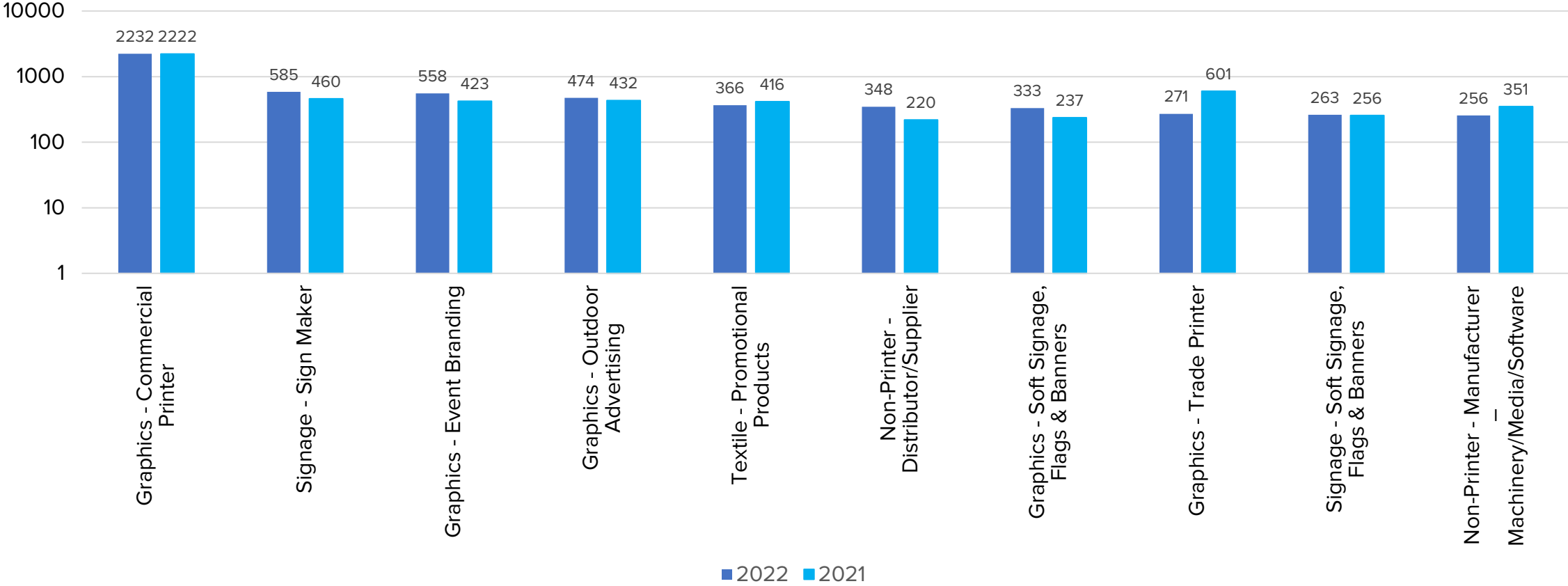


Bottom 5 decrease in membership 2022



Question 5

Please categorise your membership according to their main area of interest, by how many members you have from the following sectors



- The same sectors appeared in the top 10 for 2021 and 2022
- Graphics – Commercial Printer remained the dominant sector with over 2000 members for both years

Question 6

Please choose a total value in Euros for the sales turnover of all your printer members combined

Country	Sales Turnover
Australia	500M to 1B
Austria	1 400 000 000 Euros
Belgium	100k to 500k
Feblegra	500M to 1B
Bulgaria	10M to 50M
China	
Croatia	100M to 500M
Czech Republic	100M to 500M
Denmark	More than 1B
Finland	100M to 500M
France	1M to 5M
Germany	
Greece	500M to 1B
Hungary	5M to 10M
India	100k to 500k
Italy	500M to 1B
Japan	100M to 500M
Korea	500k to 1M
Mexico	More than 1B

Country	Sales Turnover
Nepal	
Netherlands	More than 1B
Norway	100M to 500M
Philippines	
Poland	50M to 100M
Portugal	500M to 1B
Romania	10M to 50M
Russia	
Serbia	100k to 500k
Slovakia	10M to 50M
South Africa	10M to 50M
Spain	100M to 500M
Sri Lanka	
Sweden	100M to 500M
Switzerland	
Thailand	10M to 50M
Turkey	10M to 50M
Ukraine	
United Kingdom	50M to 100M

Question 7

How many events have you held in the last year?



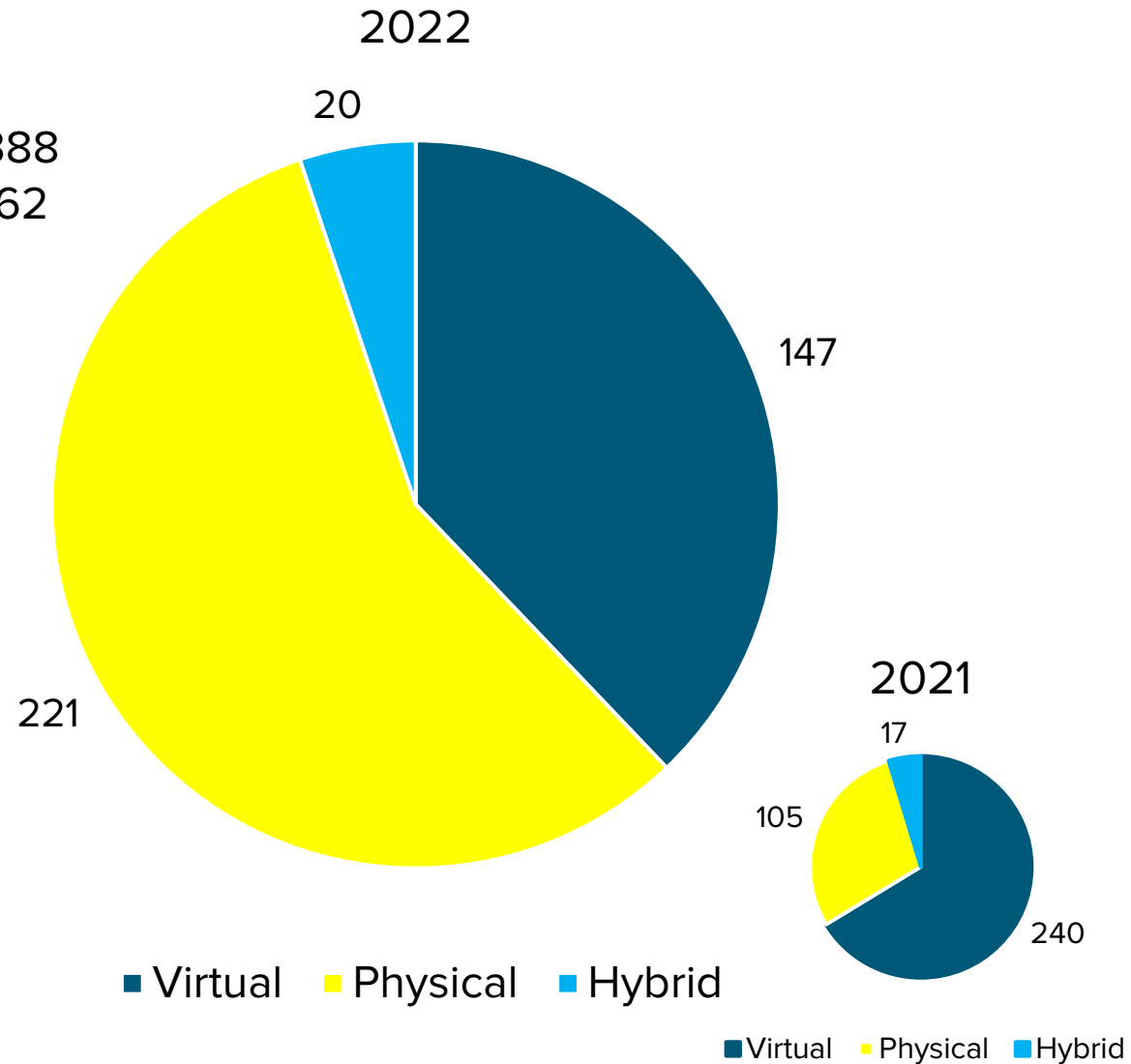
Total number of events for 2022 = 388
Total number of events for 2021 = 362
There has been a 7% increase



Virtual events have decreased by 39% since 2021 highlighting the shift from post covid times

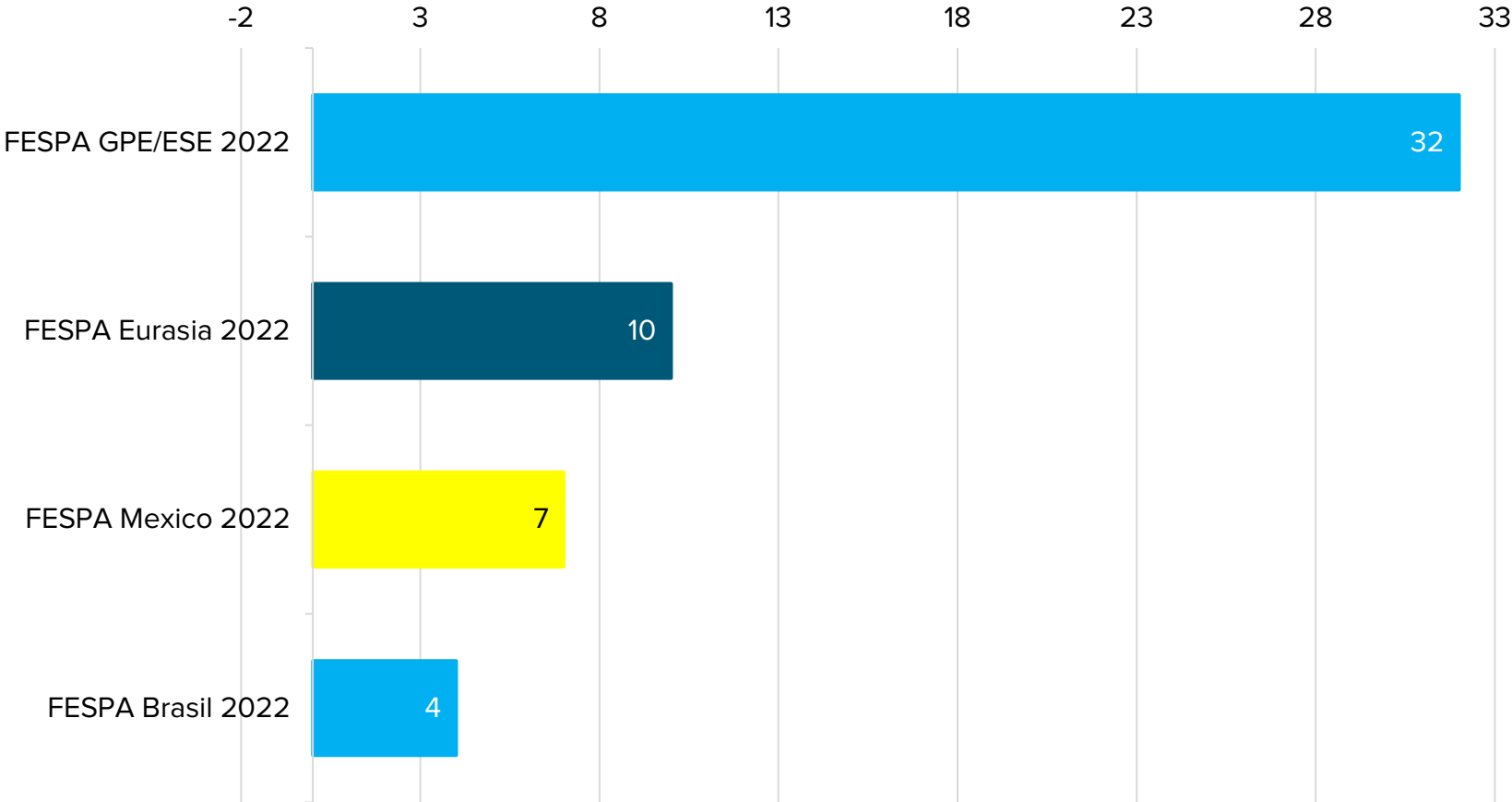


There has been an increase of 52% for physical events from 2021 to 2022



Question 9

Please tick the FESPA exhibitions advertised by your Association over the last year



*Please note that this was a multiple-choice question and we had 33 responses

Question 13

Is there anything else FESPA can do for you?

Austria

Keep up the good work. We all hope the best for the 2023 show. We will continue to promote as much as we can.

Korea

SPAK will celebrate its 40th anniversary in 2023. Please congratulate this event, advertise, and pay support.

United Kingdom

Help to encourage printers in our country to join. Help us to promote the Association to UK printers.

Turkey

To promote our events, especially the FESPA Eurasia 2023 show, and to provide financial support for our projects.

Slovakia

To support SZSDT Project Bill 18 via project Committee FESPA profit for purpose scheme.

France

We would like some support to organise a trip for our members to the FESPA events like Wrap FEST, and FESPA Global Print Expo (information about the hotel, transport to access the event from the airport, restaurant...)

Finland

You are being very helpful as it is, so I am happy!

Netherlands

More robust market segmentation Increased Global Fespa Branding (Global awareness) in End-users Markets.

Italy

Suggest to the Event Partners (big Exhibitors) to make their local marketing dept aware of the value of supporting the Fespa Community by sponsoring local events.

Thailand

Association member's business matching would be a good start to further collaborate and enhance our relationship.