

presstalis

Export of the French Press

2009
key figures





Export of the French Press

Export distribution shows an overall trend of -4% in turnover for 2009, which is in line with the French domestic market, which recorded a 3.3% decrease for dailies and 6.3% decrease for magazines.

The average rate of returns remained relatively stable at 49.76%.

The dailies faced a major drop in volume, which was partially made up for by the stability of local selling prices, which helped avoid a larger decrease in revenue which fell by 7.9%.

The magazines considerably compensated for the decrease in volume with an increase in local selling prices, and closed the year at -3.4%. This result is significantly higher than that of the French domestic market (-6.6%) and illustrates the strong price elasticity of most exported publications.

The performance of magazines in French-speaking Europe in 2009 was quite good, given that this region is recovering from two rather difficult years. Careful vigilance over adapting prices and relocations based on clearly identified opportunities made the greatest difference in this zone. Switzerland and Luxembourg also had a good year.

The European Union zone continues to suffer. Germany and England were particularly affected by considerable disruptions in their respective domestic markets. The high exchange rate should also be highlighted, as it had an impact on the results for the British market yet again this year.

The 2009 summer season in most southern European markets was disappointing with notable declines in Spain, Greece and Italy.

Africa this year was still greatly supported by the contribution of the French state subsidies (FADPPFE) with its goal of minimizing air freight rates, and its markets remained, as they have been since 2008.

We would like to highlight the positive results in the Congo (+20.1%) and in Gabon (+11.4%), both resulting from the implementation of an aggressive commercial strategy.

In the Maghreb, we highlight the spectacular performance of the Moroccan market (+12.5%), both in terms of turnover and volume, mainly due to the complete overhaul of the subsidiary's commercial positioning and logistics.

North America recorded a decline mainly as a result of the change in the euro-dollar parity.

However, we would however like to highlight the strong commercial development activities of our Canadian distributor, which have proved successful again this year.

And lastly, the Middle East made the most of a bad situation with an excellent performance in Lebanon, which took advantage of the price elasticity of its market.



- **9.1%** of Presstalis sales
- **3,154** exported titles
- **103** importing countries
- **217** million euros in sales (-4.0% *)
Dailies: **27.9** million euros (-7.9% *)
Magazines: **189.1** million euros (-3.4% *)
- Average price: **2.89** euros
- **75.2** million copies sold (-8.6% *)
Dailies: **16.6** million copies sold (-10.4% *)
Magazines: **58.6** million copies sold (-8.0% *)
- **49.7%** unsold copies

Distribution and change in turnover by geographical zone

In %	GEOGRAPHICAL ZONE	CHANGE*	MARKET SHARE
1	French-speaking Europe	-2.9%	56.8%
2	European Union	-7.2%	15.3%
3	North America	-7.3%	7.3%
4	Africa	-0.8%	6.7%
5	Maghreb	0.5%	6.3%
6	Overseas territories (Nelle Calédonie – Polynésie)	-8.2%	4.0%
7	Middle East	1.0%	2.2%
8	Europe outside the EU	-7.5%	0.5%
9	Asia-Oceania	-28.9%	0.7%
10	South America	-23.3%	0.2%
	Total	-4.0%	100.0%

Top 30 importing countries (in turnover)

In %	COUNTRY	CHANGE*	MARKET SHARE	AVERAGE PRICE IN EUROS
1	Belgium	-5.8%	31.3%	2.66
2	Switzerland	1.6%	22.0%	3.25
3	Canada	-7.8%	6.0%	4.10
4	Spain	-5.1%	4.0%	2.31
5	Morocco	12.5%	3.4%	1.96
6	Luxembourg (Grand Duchy)	-1.4%	3.4%	2.61
7	Italy	-9.4%	2.5%	2.91
8	New Caledonia	-8.7%	2.1%	5.59
9	Tunisia	-6.8%	2.0%	1.60
10	Portugal	-9.2%	1.9%	3.16
11	French Polynesia	-6.0%	1.7%	6.14
12	Germany	2.9%	1.6%	3.03
13	United Kingdom	-16.3%	1.5%	1.89
14	Gabon	11.4%	1.4%	3.29
15	Greece	-4.5%	1.4%	2.89

In %	COUNTRY	CHANGE*	MARKET SHARE	AVERAGE PRICE IN EUROS
16	Lebanon	13.3%	1.3%	3.73
17	Ivory Coast	-3.7%	1.2%	3.12
18	Senegal	-1.3%	1.0%	3.23
19	United States	-7.0%	1.0%	5.20
20	Cameroon	-5.6%	0.9%	3.23
21	Algeria	-19.5%	0.8%	1.58
22	Netherlands	-6.0%	0.6%	3.00
23	Mauritius	-2.6%	0.5%	3.60
24	Congo	20.1%	0.4%	3.35
25	Turkey	-6.3%	0.3%	3.09
26	Romania	-12.4%	0.3%	2.46
27	Austria	-0.4%	0.3%	3.12
28	Israel	-29.0%	0.2%	4.05
29	Madagascar	-2.3%	0.2%	3.51
30	Mali	-0.9%	0.2%	3.05
	Total		95.7%	

*Compared to 2008.