



presstalis

Exports

French press

2010 **Key
figures**



Exports of the French press

With more than €190 million in turnover, export distribution fell by 12% in 2010, in line with the French domestic market, where sales were down by -7.8% for dailies and -10.5% for magazines. The percentage of unsold copies remained relatively stable, at an average of 51.8%.

Dailies continued to decline in terms of number of copies sold (-10.8%). This sharp drop in sales is reflected in the turnover decline (-11.6%) as the rise of the local selling prices didn't compensate the decrease in volume as it did last year. However, magazines considerably counterbalanced their drop in volume (-20.1%) with the increase in value. This decline of sales mainly resulted from the fact that some publishers decided to stop their partnership with Presstalis, which impacted the magazines segment especially in the French-speaking zone in 2010. Belgium sales were particularly affected, while Switzerland held up relatively well.

The European Union posted contrasting results: the United Kingdom performed somewhat better than its local market, hit hard by the recession; Germany is fairly stable and the summer season in most Southern Europe markets (Spain, Italy, Portugal, Greece) was disappointing in a difficult economic context.

African markets, which continue to receive strong support from French government subsidies (FADPPFE**) aimed at offsetting the rise in airfreight costs, turned in starkly diverging results. Significant disparities emerged between countries that are only supplied by air as opposed to those supplied by surface as well.

In North Africa, the Moroccan market maintained its strong performance which started beginning of last year. In Algeria, administrative restrictions (2009 Finance law) contributed to the decline of sales in this area because we had to suspend our deliveries by boat from March to September 2010.

North America confirmed its positive trend, with a particularly prosperous year in Canada, which benefited from the aggressive sales drive.

Lastly, exports increased in more distant geographical regions, with substantial growth in Asia-Oceania and South-America. The latter region was driven by the Brazilian market (up 22.6%) thanks to the dynamism of our distributor.

61.6 million copies sold (-18%)*
 ● newspapers **14.8 million** copies sold (-10.8%)*
 ● magazines **46.8 million** copies sold (-20.1%)*

9.5%
of Presstalis sales in turnover

€191 million in sales (-12.1%)*
 ● newspapers **€25 million** (-11.6%)*
 ● magazines **€166 million** (-12.2%)*

51.8%
unsold copies

101
importing countries

2820
magazines and newspapers exported

Average price
€3.10

* versus 2009

** Fonds d'Aide à la Distribution et à la Promotion de la Presse Française à l'Étranger

Distribution and change in turnover by geographical region

Geographical regions	Change*	Volume
1 French-speaking Europe	-16.4%	54.1%
2 European Union	-8.2%	16.0%
3 North America	-0.1%	8.4%
4 Africa	-10.1%	6.9%
5 Maghreb	-6.6%	6.6%
6 Overseas territories (New Caledonia, Polynesia)	-11.6%	4.0%
7 Middle east	-2.2%	2.4%
8 Europe outside the EU	-4.4%	0.5%
9 Asia-oceania	12.2%	0.8%
10 South America	13.7%	0.3%
Total	-12.1%	100%

Top 30 importing countries in turnover

Country	Change*	Market share	Average price
1 Belgium	-24.6%	26.9%	€2.89
2 Switzerland	-5.1%	23.7%	€3.52
3 Canada	3.5%	7.1%	€4.61
4 Morocco	3.3%	4.0%	€1.97
5 Spain	-13.3%	3.9%	€2.37
6 Luxembourg (Grand Duché)	-14.8%	3.3%	€2.78
7 Italy	-6.6%	2.7%	€2.99
8 New Caledonia	-9.8%	2.2%	€5.80
9 Portugal	-2.8%	2.1%	€3.25
10 Tunisia	-10.3%	2.0%	€1.67
11 Germany	-2.2%	1.8%	€3.15
12 French Polynesia	-15.8%	1.6%	€6.35
13 United Kingdom	-7.4%	1.6%	€1.96
14 Lebanon	0.9%	1.5%	€3.89
15 Greece	-7.9%	1.4%	€2.91
16 Gabon	-17.8%	1.3%	€3.45
17 Ivory Coast	-6.9%	1.3%	€3.39
18 Senegal	-2.4%	1.1%	3.39
19 Cameroon	-8.2%	1.0%	€3.29
20 United States	-13.5%	1.0%	€5.06
21 Netherlands	-7.1%	0.7%	€3.07
22 Algeria	-38.6%	0.6%	€1.34
23 Mauritius	-6.3%	0.6%	€3.86
24 Turkey	-0.4%	0.4%	€3.31
25 Congo	-19.1%	0.4%	€3.44
26 Austria	0.7%	0.3%	€3.34
27 Romania	-24.4%	0.3%	€2.76
28 Mali	7.9%	0.3%	€3.07
29 Israel	2.8%	0.3%	€4.34
30 Brazil	22.6%	0.2%	€6.52
Total		95.7%	

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* versus 2009