

INDUSTRY STRUCTURE ANALYSIS 2017-19

ANALYSIS OF THE EUROPEAN PROMOTIONAL PRODUCT VALUE CHAIN

STATUS REPORT NOVEMBER 2018



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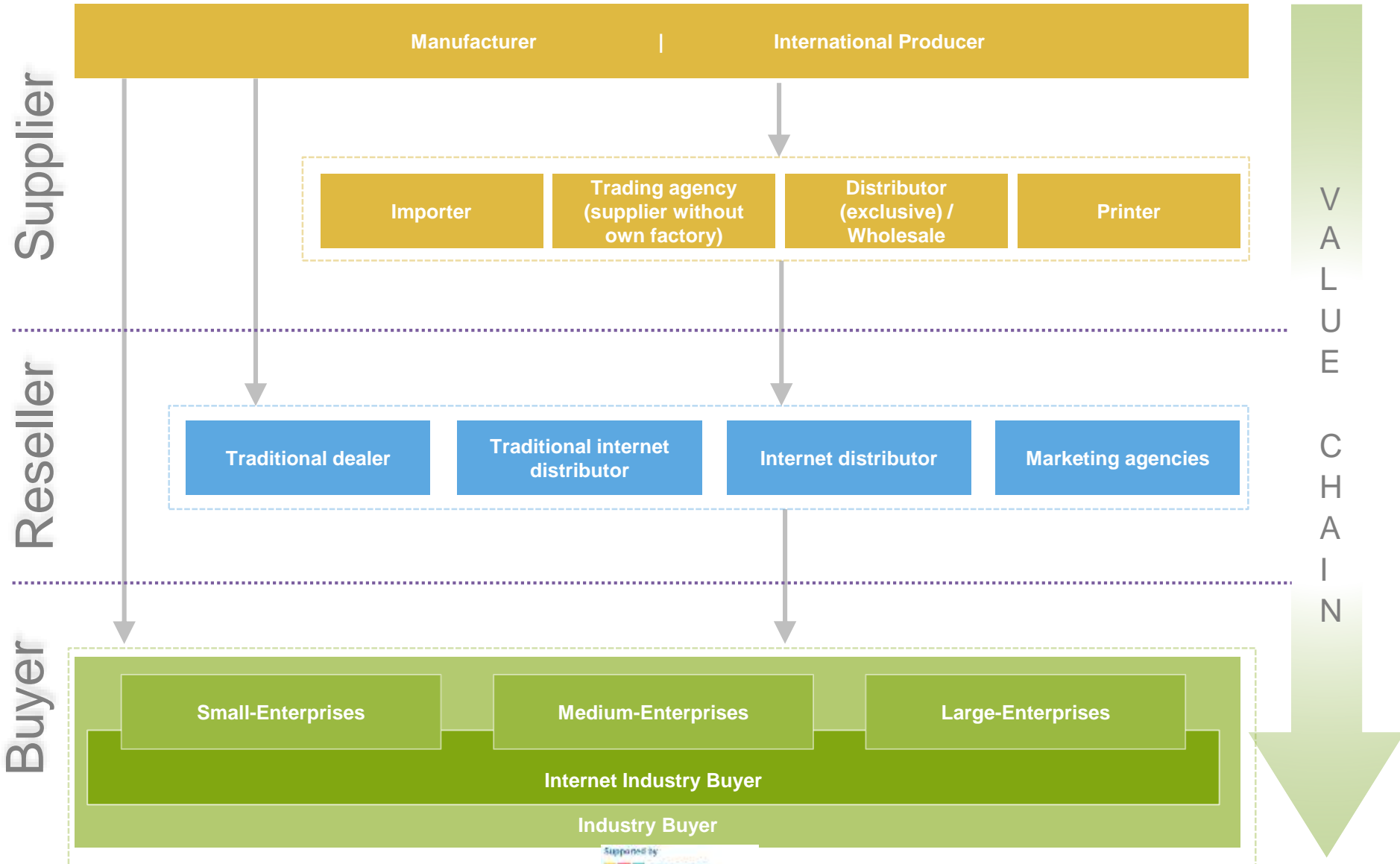


GWG

Gesamtverband der
Werbeartikel-Wirtschaft e.V.

Value Chain used for Market Research

Promotional product market View





Classification Supplier

Main Dimension	Value Chain	main sector (Survey - questionnaire)	sub sector (Survey - questionnaire)	Definition (particular mouse over in questionnaire)
Supplier (A supplier is a party that supplies promotional products)	Manufacturer	Supplier	Manufacturer	A manufacturer is a company that processes raw materials into finished promotional products through the use of tools and processes.
	Importer	Supplier	Importer	An importer is a company that imports promotional products from foreign economies into the own economy.
	Supplier without own factory	Supplier	Manufacturer	A supplier without own factory is supplier for promotional products that produces products through a contractual manufacturer not associated with the company.
	Distributor/ Wholesale	Supplier	Distributor/ Wholesale	A wholesaler is an intermediary entity in the distribution channel that buys large quantities of promotional products from manufactures, imports and warehouses and sells them primarily to resellers. For promotional textiles the wholesaler is often referred to as 'distributor' and sells next to resellers also to printers
	Printer	Printer	Printer	A printer is a company that is specialized in printing / imprinting promotional products



Classification Reseller

Main Dimension	Value Chain	main sector (Survey - questionnaire)	sub sector (Survey - questionnaire)	Definition (particular mouse over in questionnaire)
Reseller (Also sometimes known as a value-added reseller (VAR) is a company that buys promotional products and sells the products (with or without modification) under its own name)	Traditional dealer	Reseller	Traditional dealer	A traditional dealer/ reseller sells promotional products and services through so called traditional offline distribution-channels like print, catalogue and field service employees.
	Traditional internet distributor	Reseller	Traditional internet distributor	A traditional internet distributor/ reseller activates interest online, but converts, sells and services mostly offline (but without outdoor salesforce)
	Internet distributor	Reseller	Internet distributor	A internet distributor/ reseller sells promotional products and services mainly through their online-shop.
	Marketing agencies	Marketing agencies	Marketing agencies	A marketing agency offers advertising products and services within a marketing campaign without specific online distribution.



GET GOODS / SELLS GOOD

Main Dimension	Value Chain	Gets goods from	Sells goods to	
Supplier (A supplier is a party that supplies promotional products)	Manufacturer	(International Producer/)	Distributors, Resellers, Industry Buyers	
	Importer	International Producer	Distributors, Resellers, Industry Buyers	
	Supplier without own factory	International Producer	Distributors (mainly), Resellers, Industry Buyers	
			International Producer, Supplier	Reseller (mainly) , wholase (rarely)
	Distributor/ Wholesale			
	Printer		by order of any other	Reseller, Industry Buyer



GET GOODS / SELLS GOOD

Main Dimension	Value Chain	Gets goods from	Sells goods to
Reseller (Also sometimes known as a value-added reseller (VAR) is a company that buys promotional products and sells the products (with or without modification) under its own name)	Traditional dealer	International Producer/, Supplier	Industry Buyer
	Traditional internet distributor	International Producer/, Supplier	Industry Buyer
	Internet distributor	International Producer/, Supplier	Industry Buyer
	Marketing agencies	International Producer/, Supplier	Industry Buyer



MARKET – PURCHASE BY INDUSTRY BUYERS



4.759 
up to 9 employees

880 
10 to 19 employees

1.154 
20 to 49 employees

2.881 
50 to 249 employees

2.302 
more than 250 employees

BASIS DATA

Europe

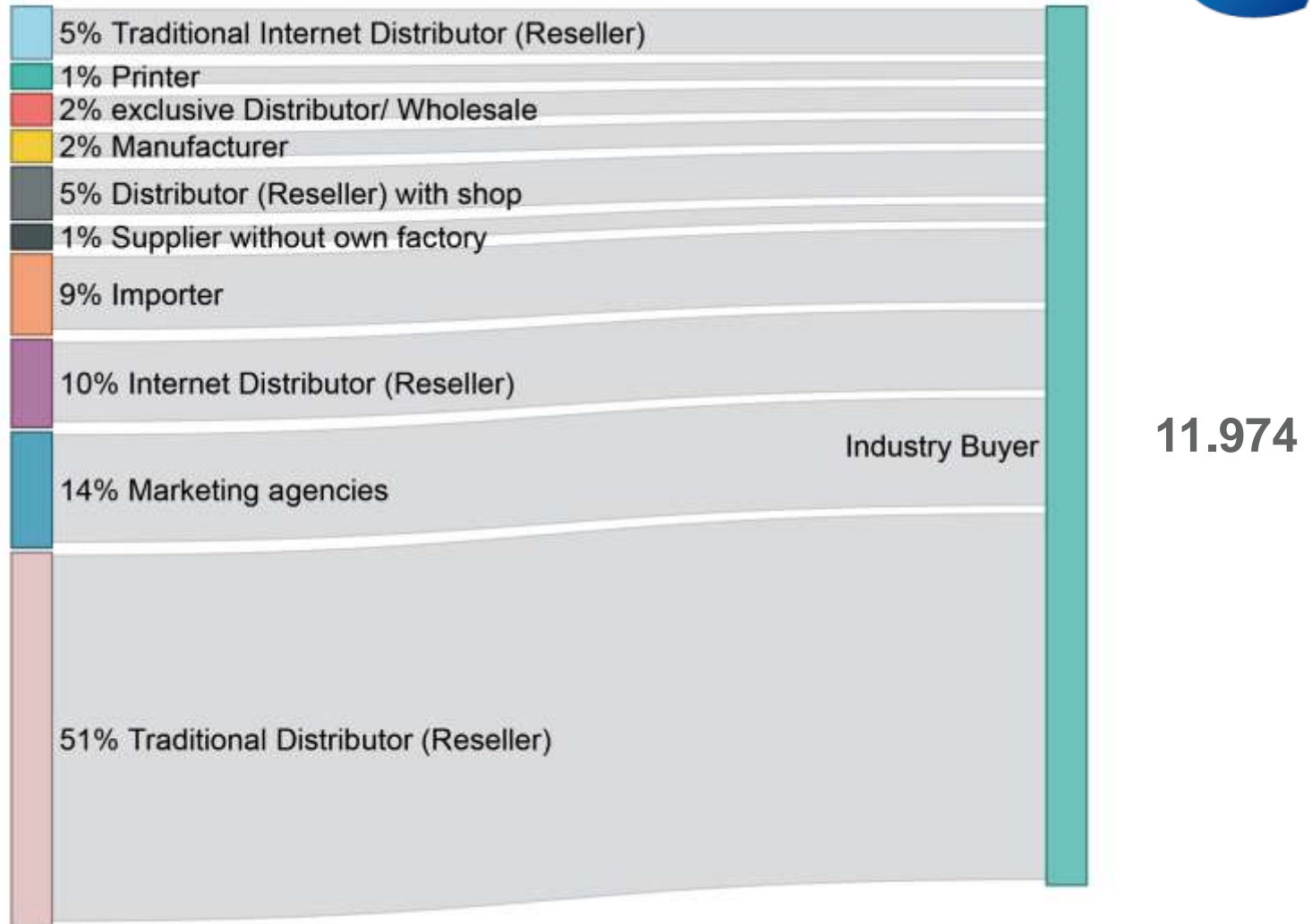
TOP 10

Europa Top10
11.974

Revenue to industry buyers

Revenue all over (inc. Cross)	companies	m.€
Supplier	10.974	13.506
Manufacturer	4.489	2.748
Supplier without own factory	1.496	1.079
Importer	4.046	7.423
exclusive Distributor/ Wholesale	222	1.668
Printer	720	588
Reseller	9.643	13.478
Distributor (Reseller) with shop	333	924
Traditional Distributor (Reseller)	6.540	7.925
Internet Distributor (Reseller)	942	1.775
Traditional Internet Distributor (Reseller)	1.441	866
Marketing agencies	388	1.988

EUROPE TOP10

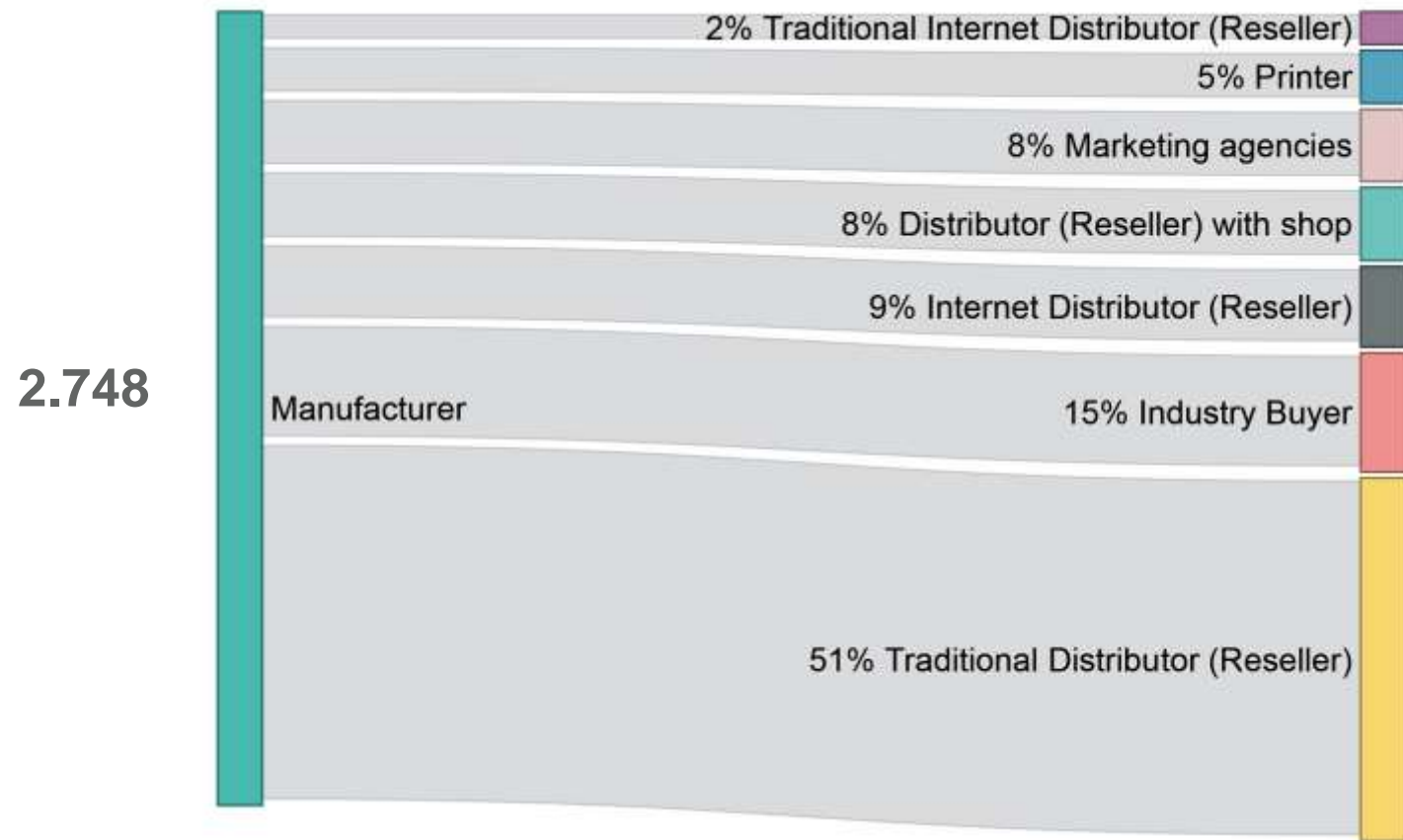


Revenue in m.€ **directly** to industry buyer

Top down ↓



EUROPE TOP10

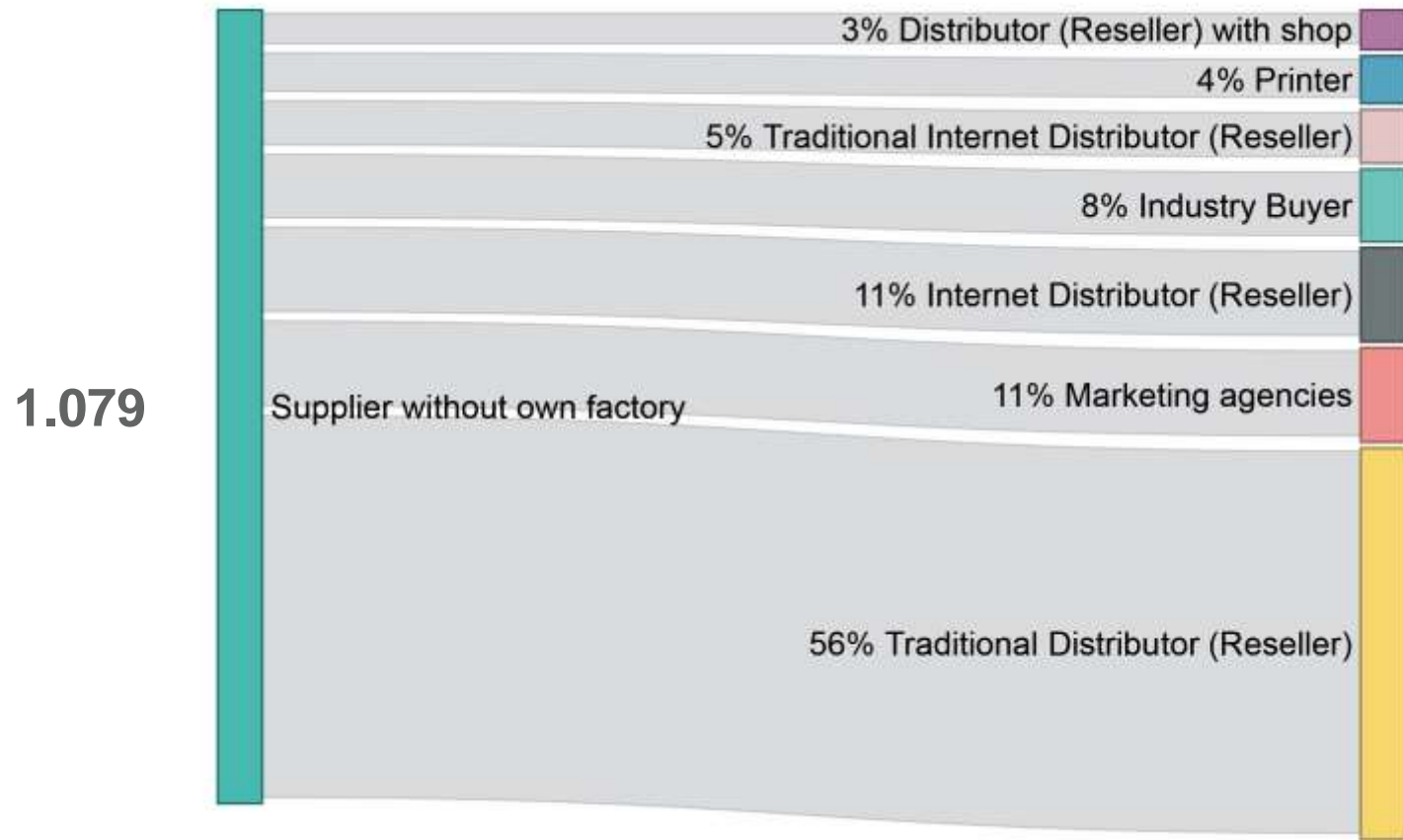


allocation of revenue all over in m.€

Top down ↓



EUROPE TOP10

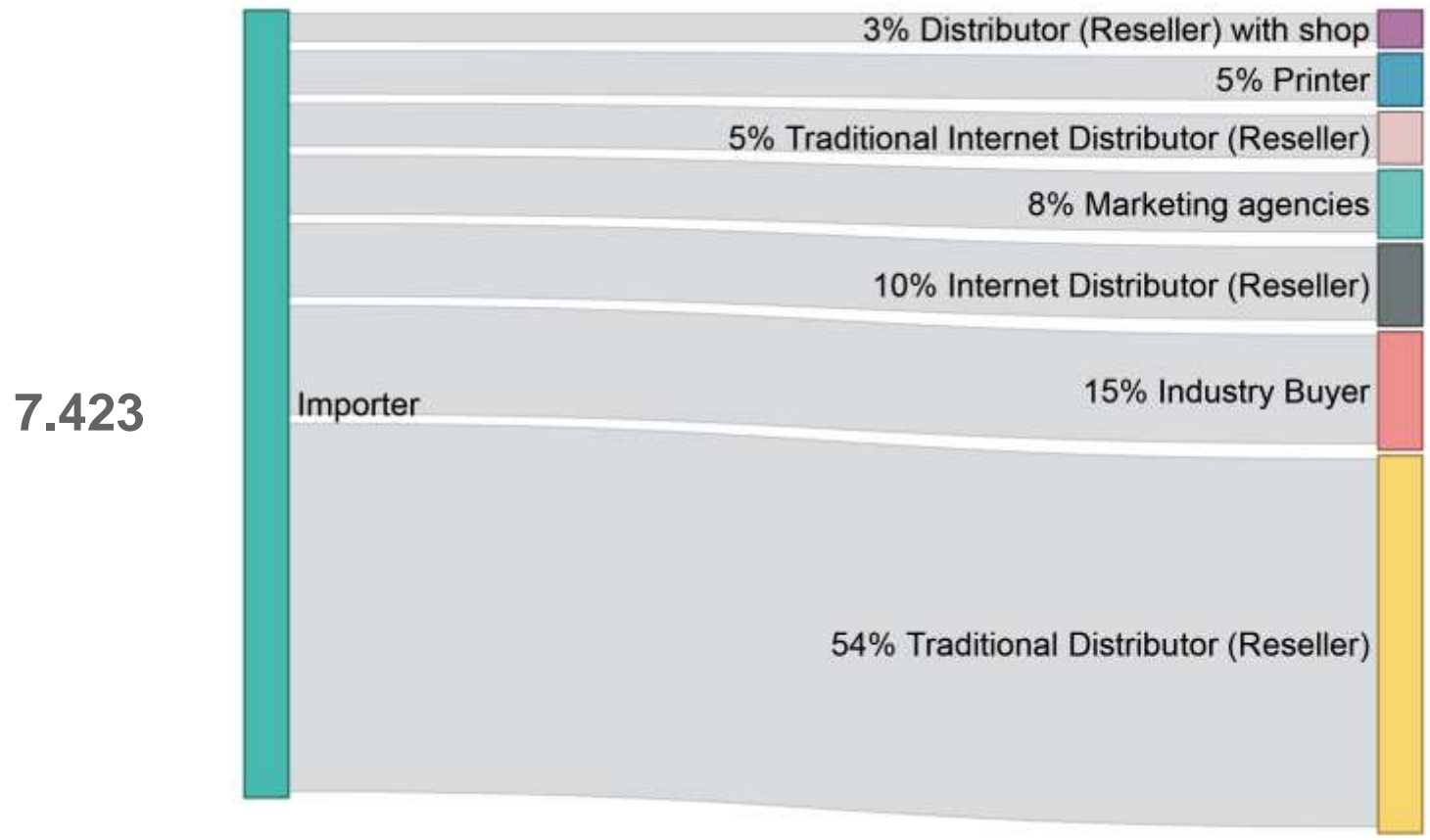


allocation of revenue all over in m.€

Top down ↓



EUROPE TOP10

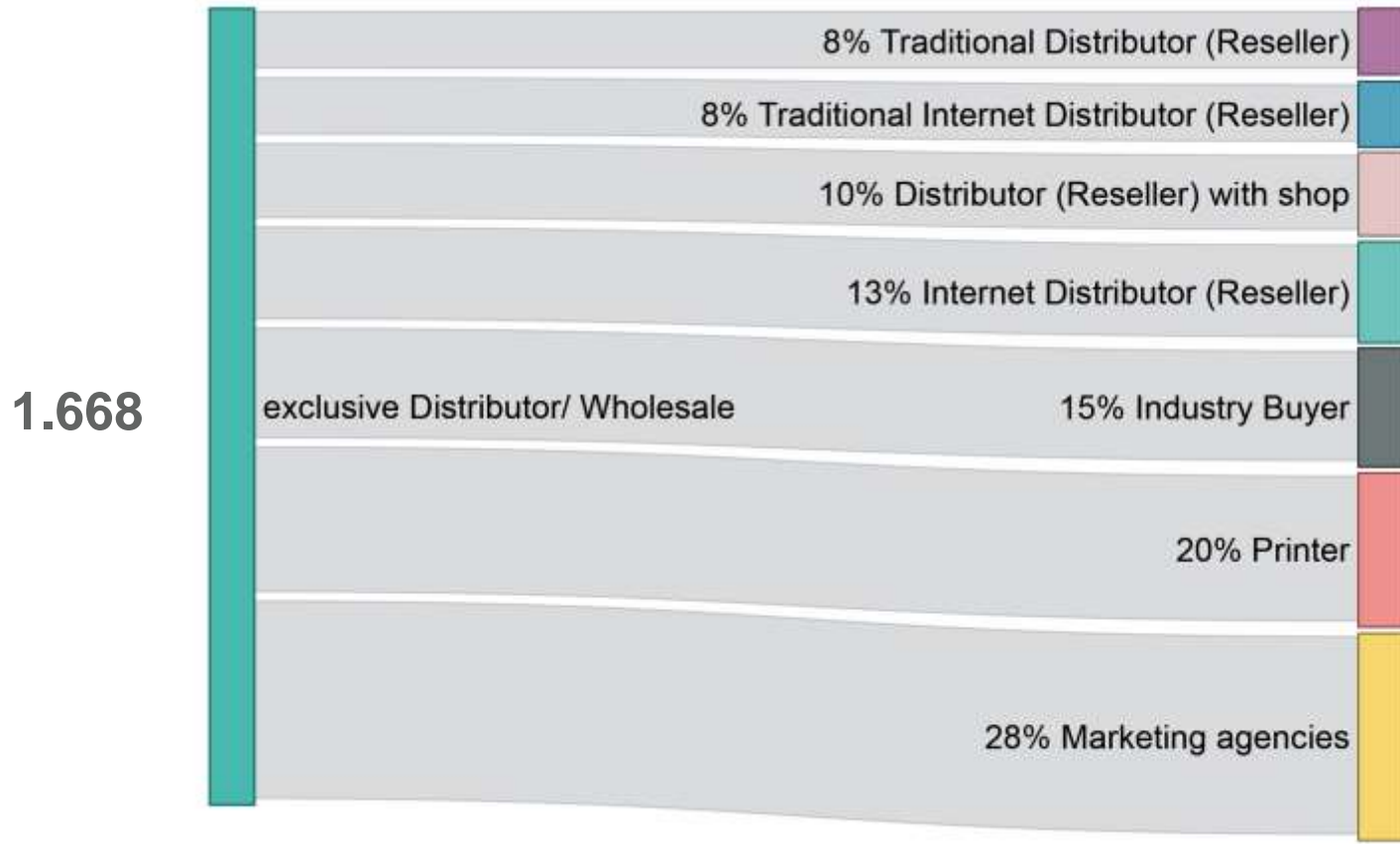


allocation of revenue all over in m.€

Top down ↓



EUROPE TOP10

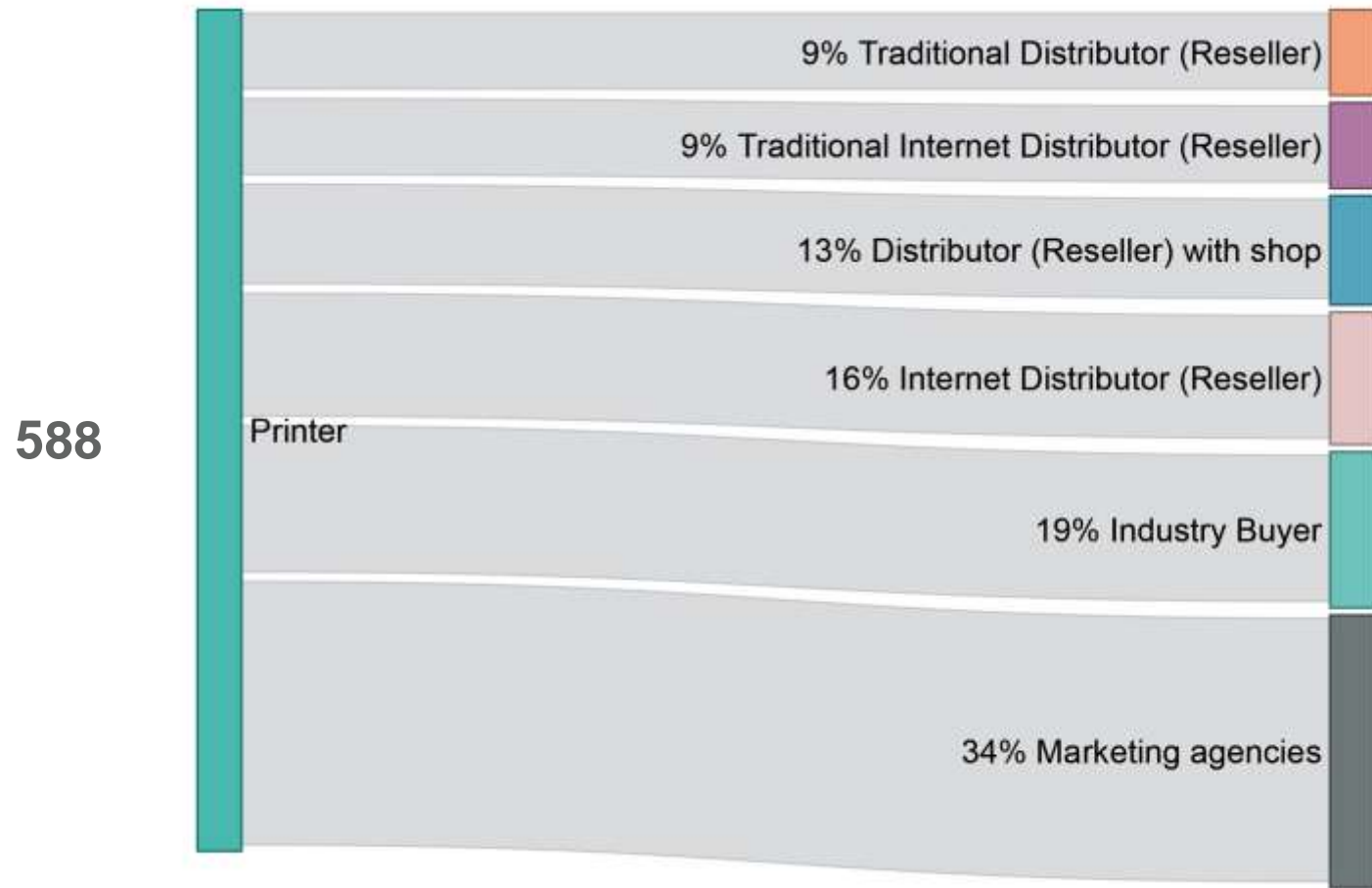


allocation of revenue all over in m.€

Top down ↓



EUROPE TOP10

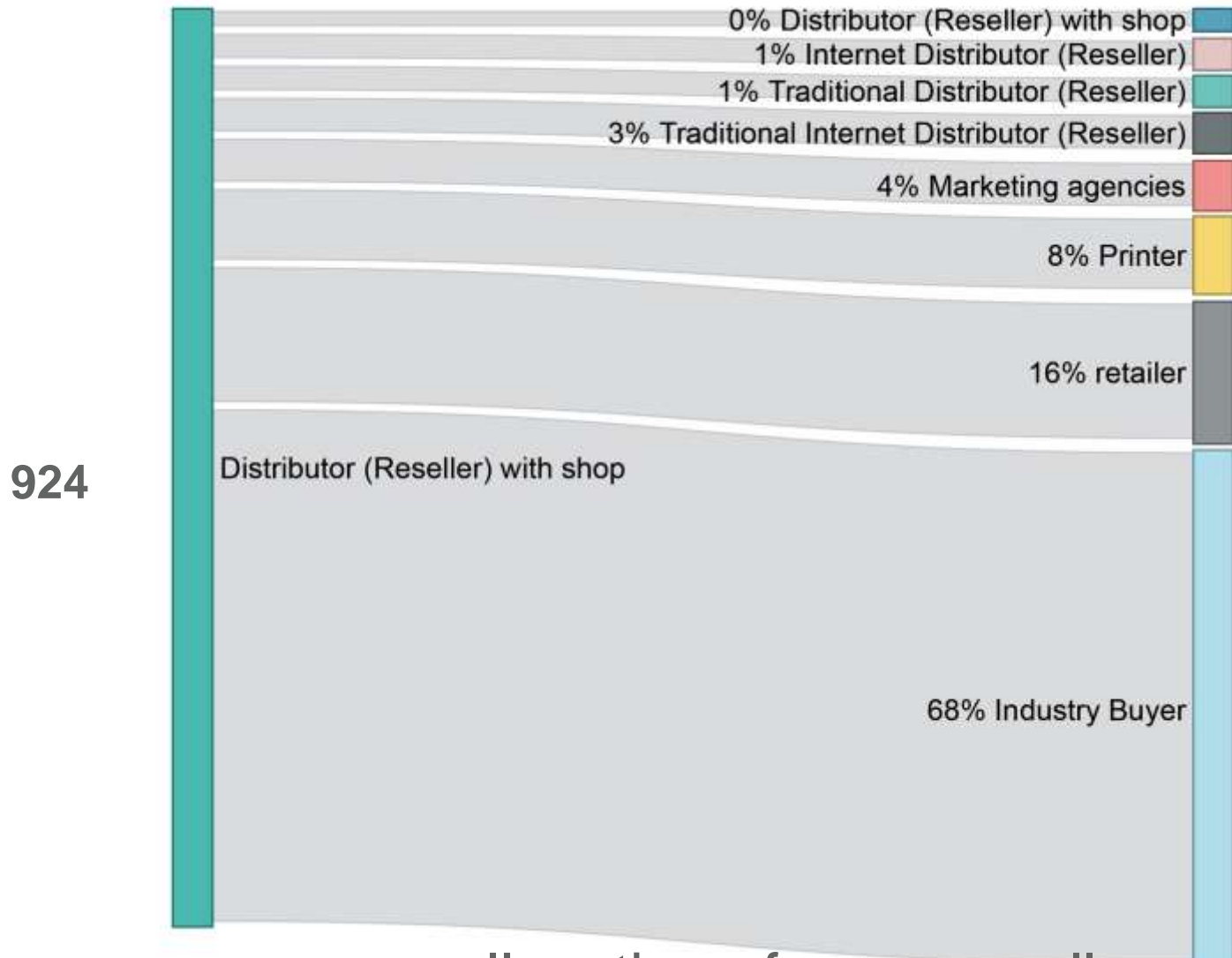


allocation of revenue all over in m.€

Top down ↓



Distributor (Reseller) with shop



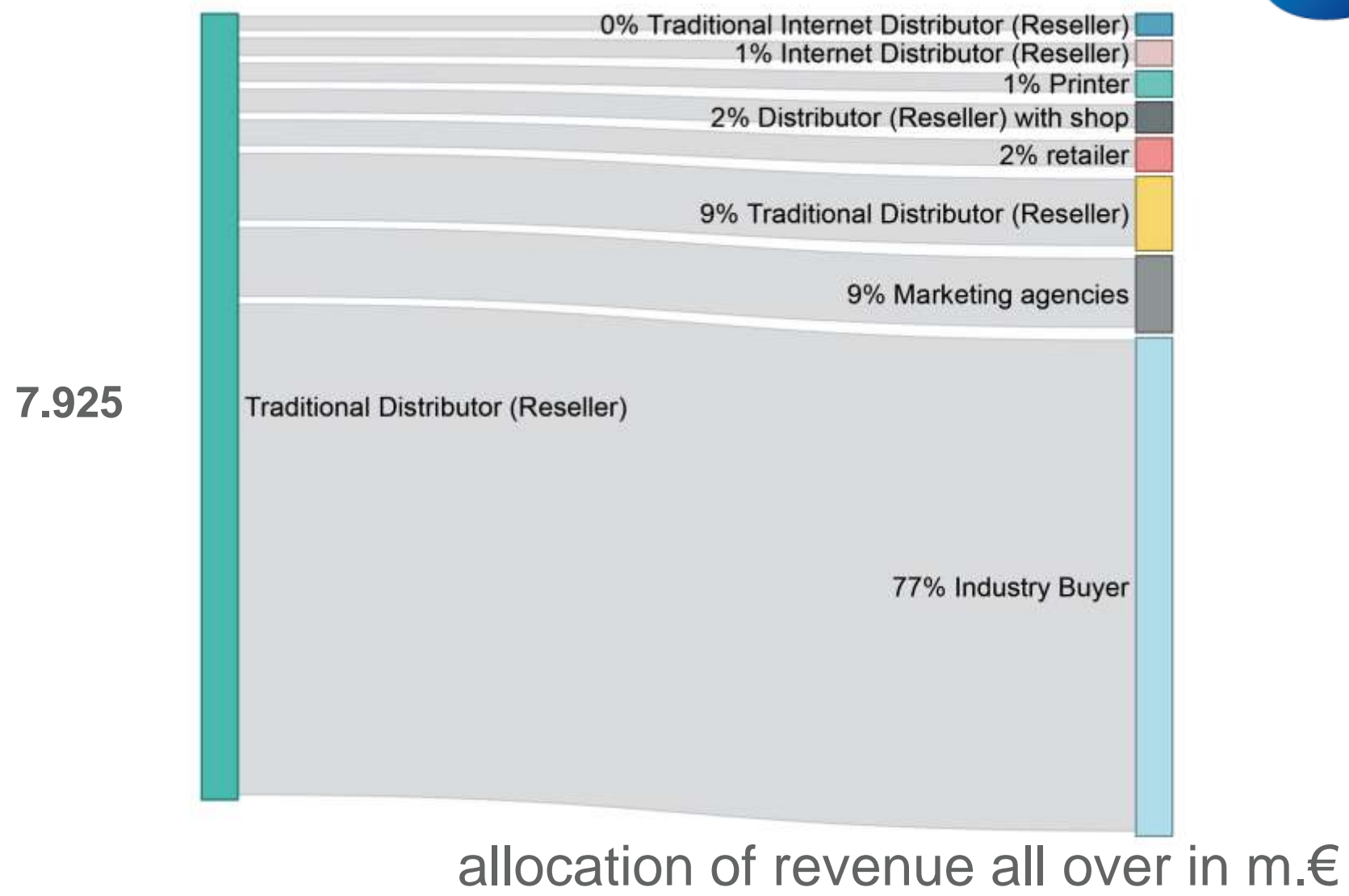
924

allocation of revenue all over in m.€

Top down ↓



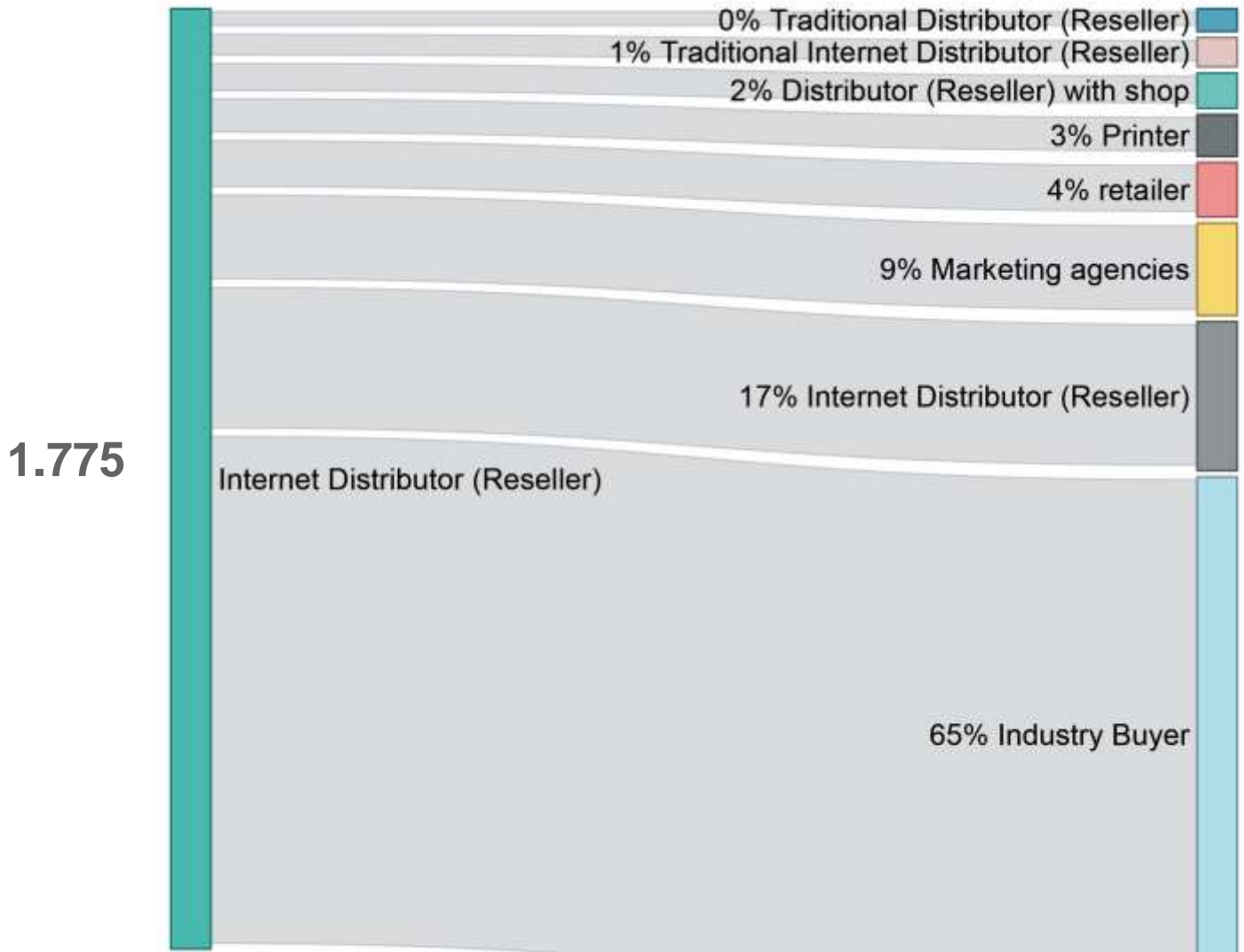
Traditional Distributor (Reseller)



Top down ↓



Internet Distributor (Reseller)



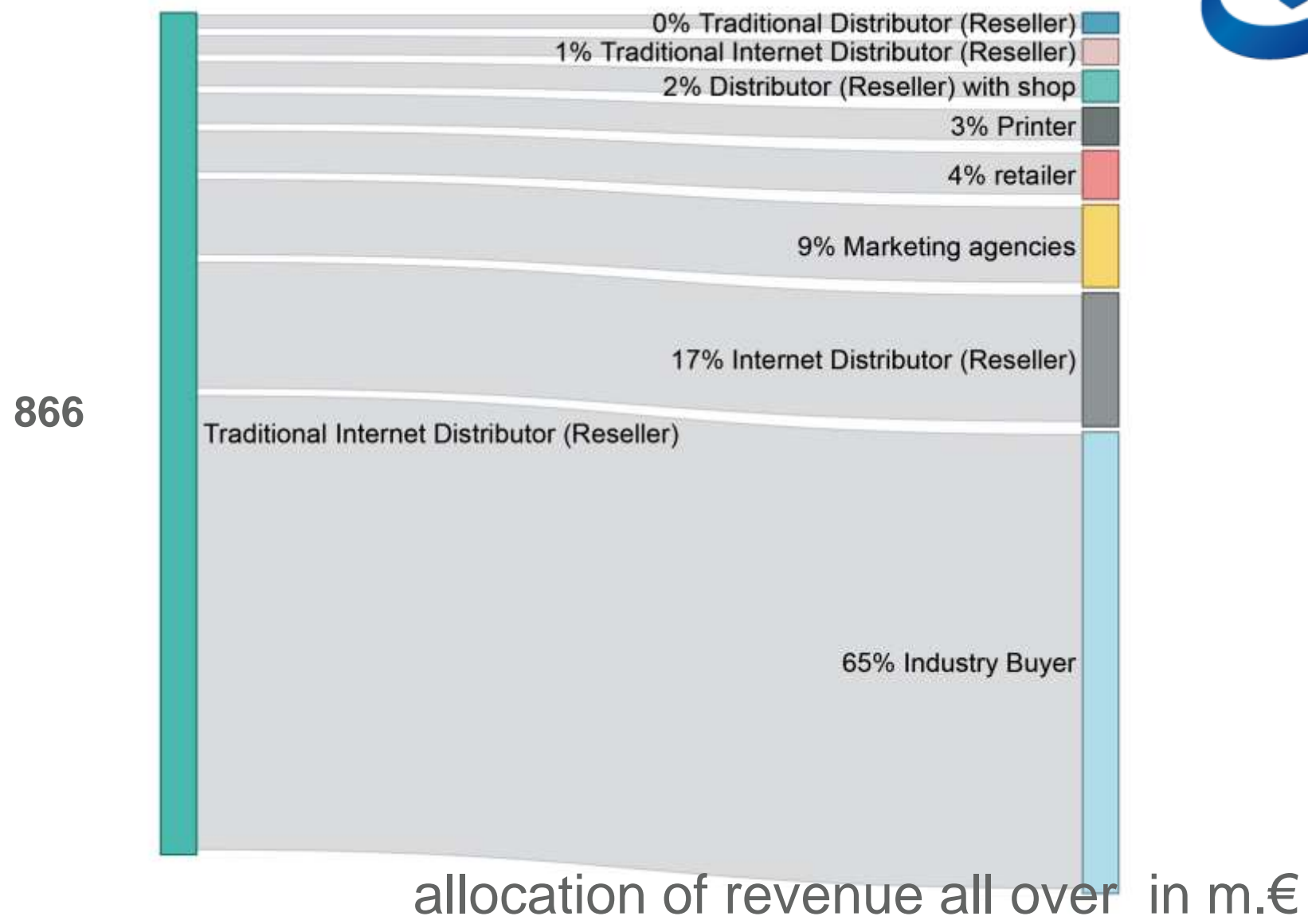
1.775

allocation of revenue all over in m.€

Top down

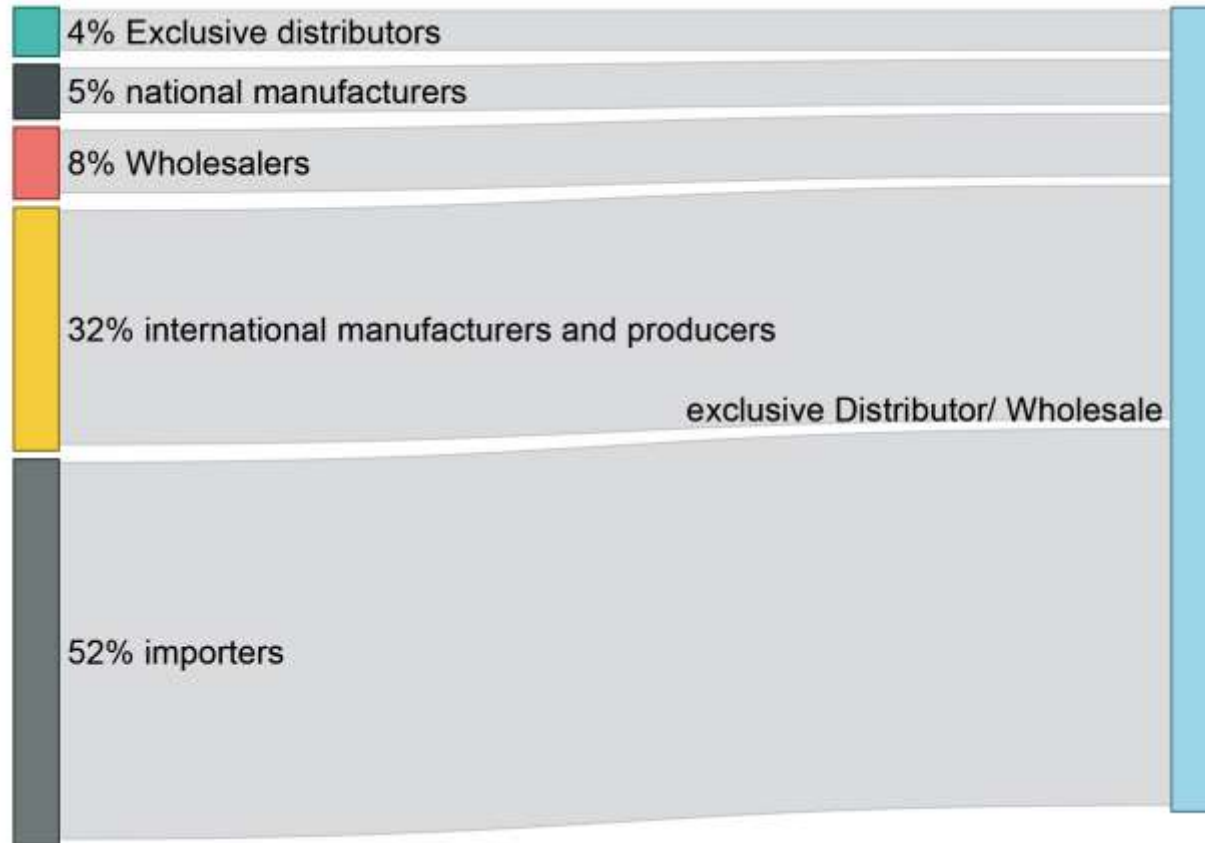


Traditional Internet Distributor (Reseller)





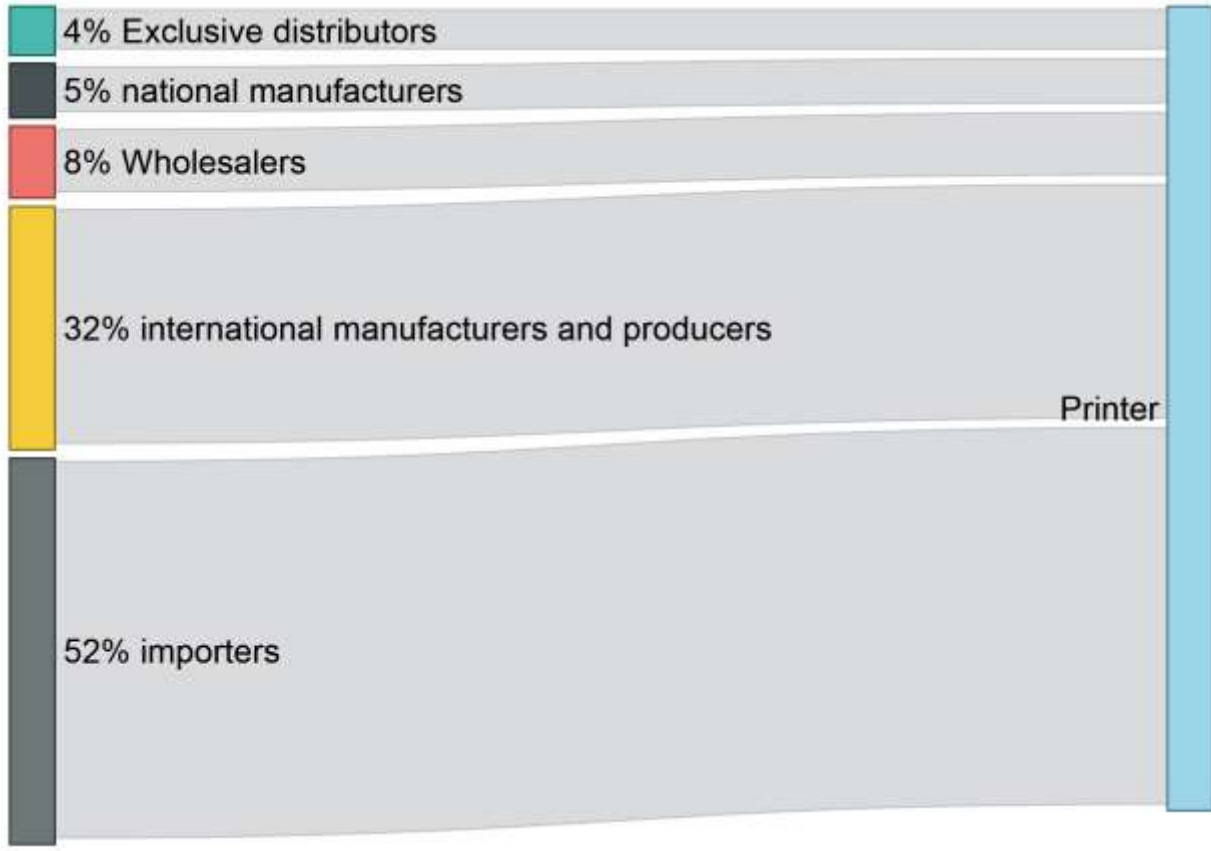
Exclusive Distributor / Wholesale



allocation of purchase



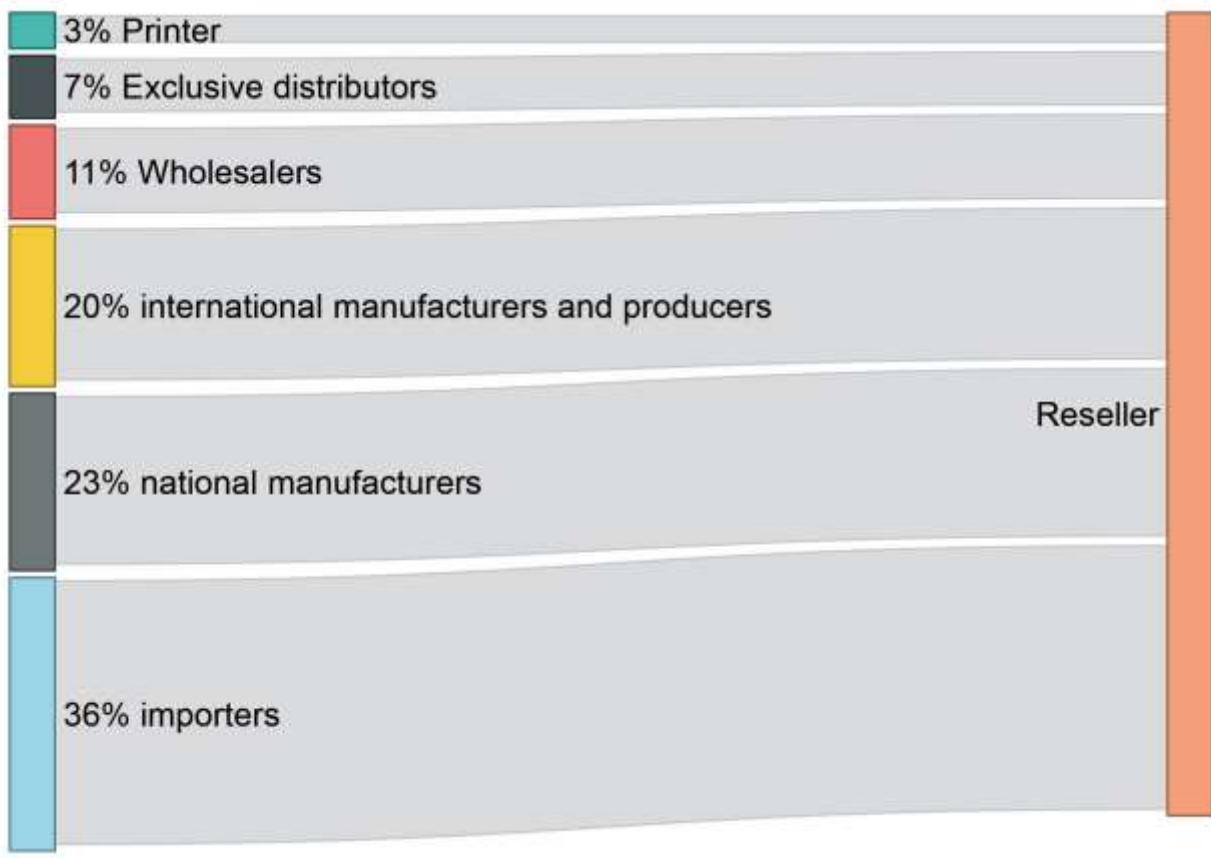
Printer



allocation of purchase



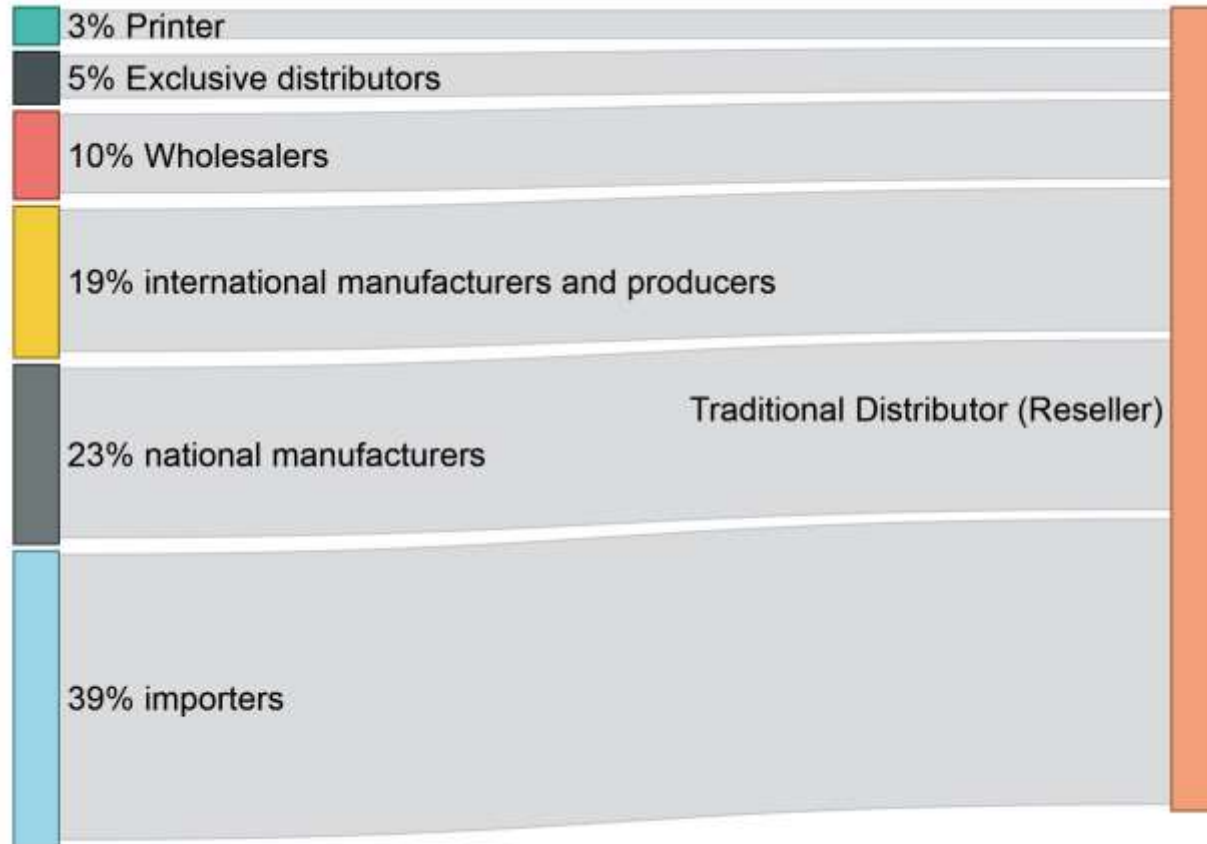
Reseller



allocation of purchase



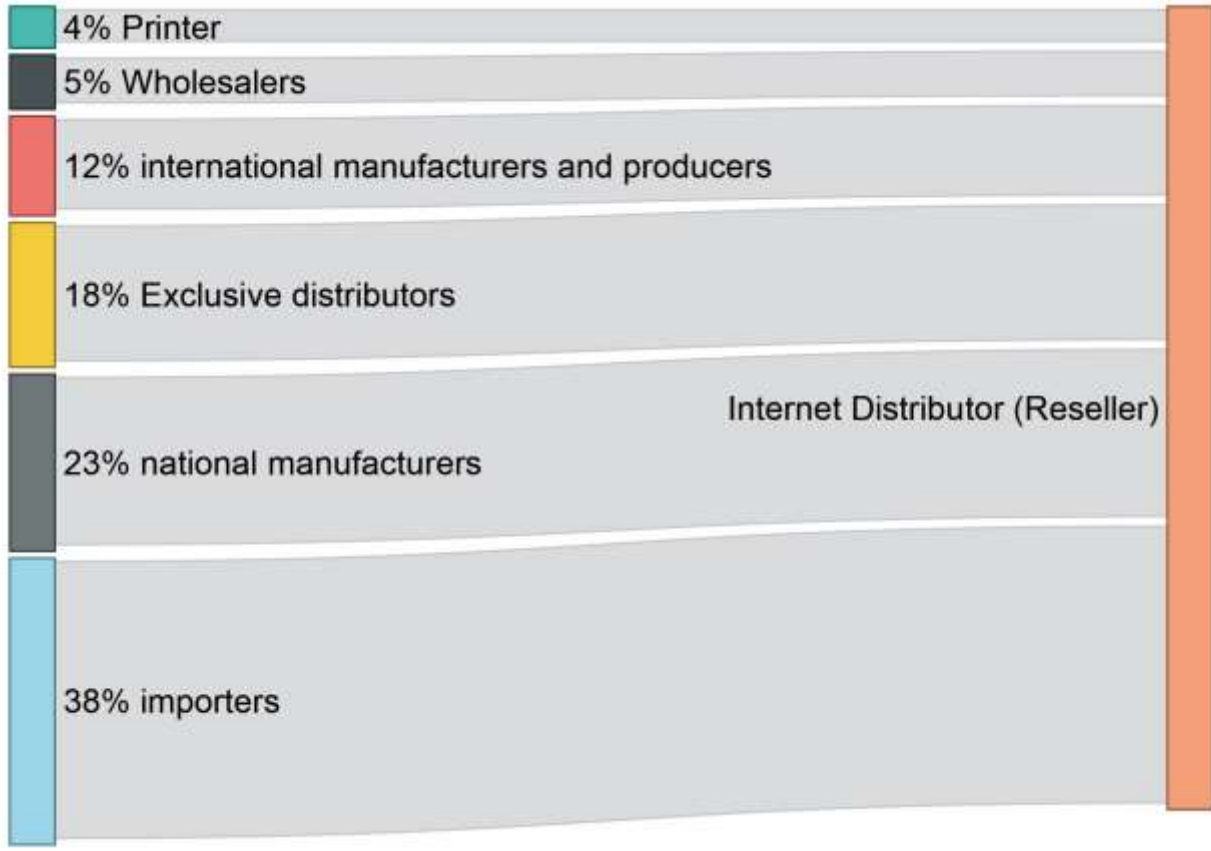
Traditional Distributor (Reseller)



allocation of purchase



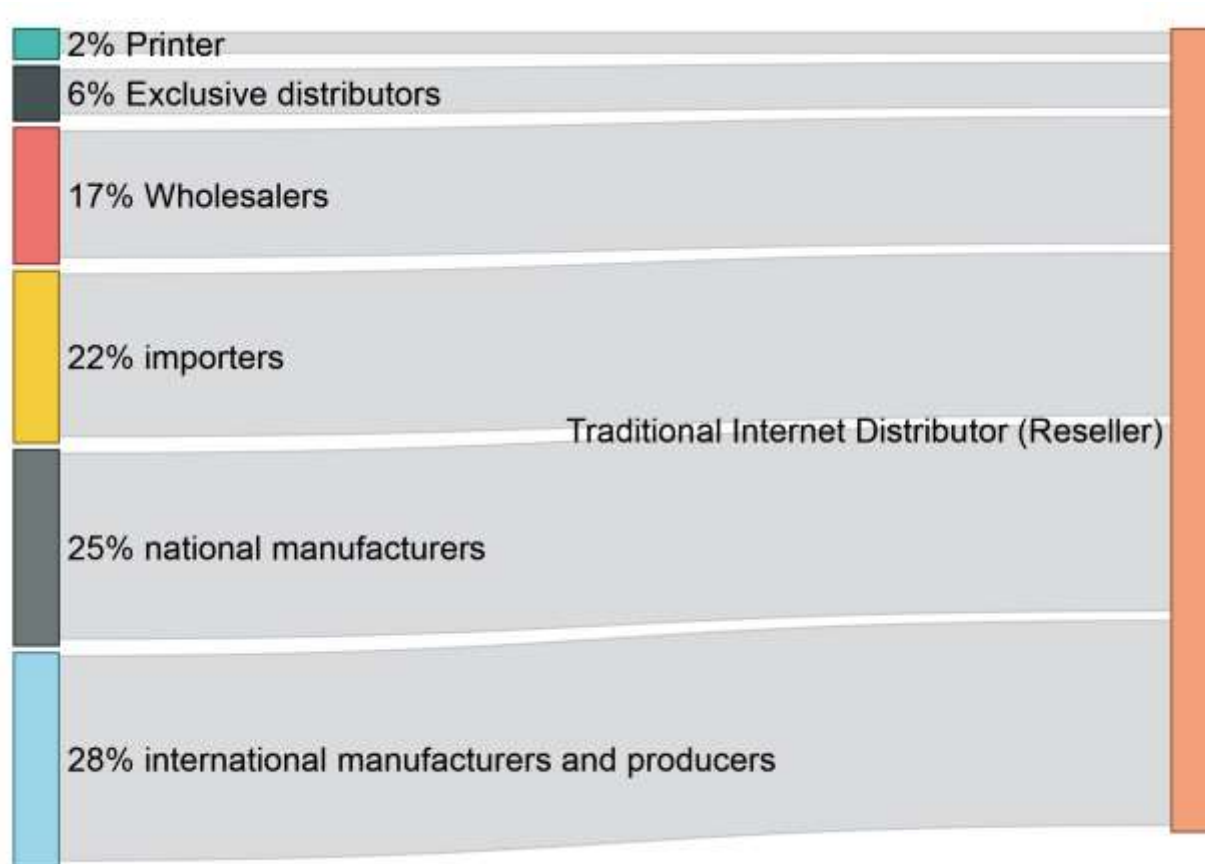
Internet Distributor (Reseller)



allocation of purchase



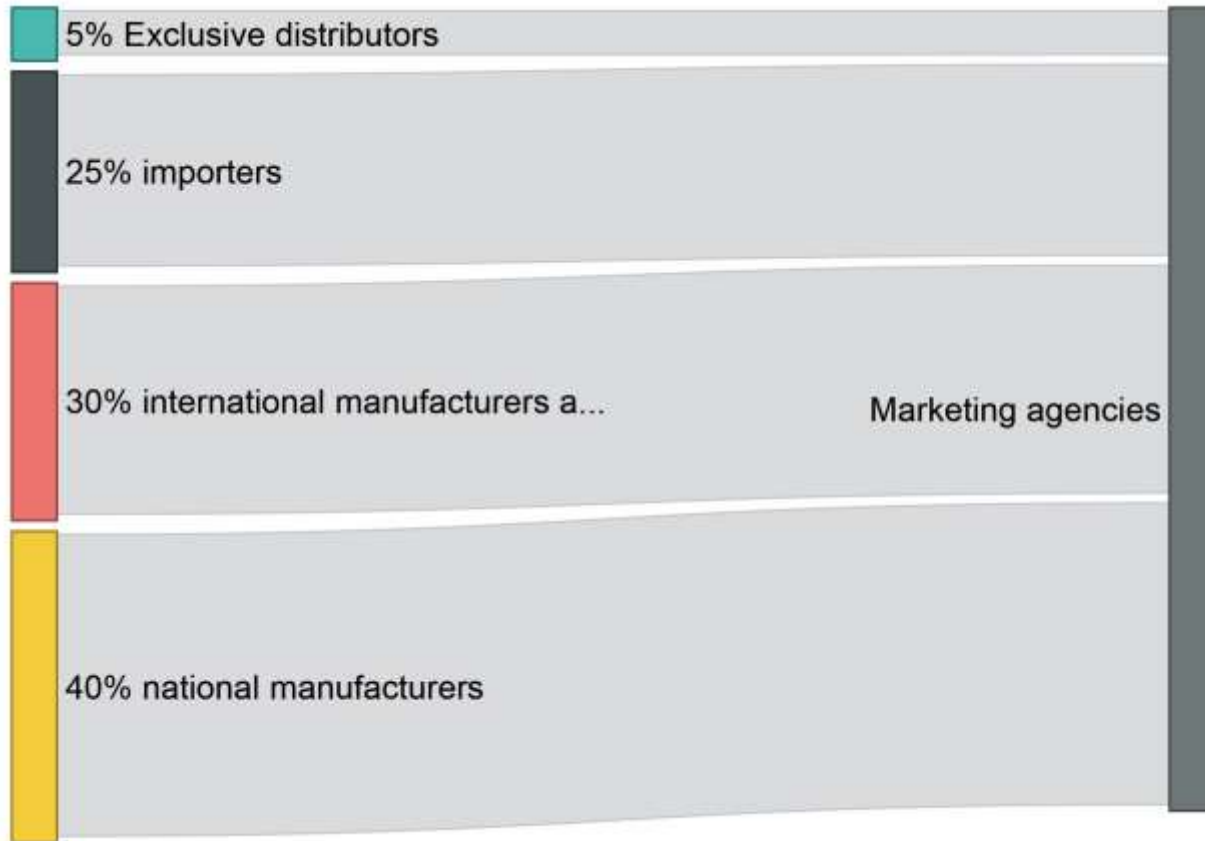
Traditional Internet Distributor (Reseller)



allocation of purchase



Marketing Agencies



allocation of purchase



MARKET – PURCHASE BY INDUSTRY BUYERS

SIZE_EMP	Insgesamt	0 bis 9 Beschäftigte	10 bis 19 Beschäftigte	20 bis 49 Beschäftigte	50 bis 249 Beschäftigte	250 Beschäftigte und mehr
GEO/TIME	2017	2017	2017	2017	2017	2017
Europäische Union (Top 10)	11.974	4.759	880	1.154	2.881	2.302
Belgien	355	171	25	33	69	56
Deutschland (bis 1990 früheres Gebiet der BRD)	3.539	932	259	373	1.057	917
Spanien	1.041	545	73	94	192	137
Frankreich	1.685	828	108	156	330	263
Italien	1.439	815	119	113	243	149
Niederlande	636	312	36	52	140	97
Österreich	315	84	34	41	89	68
Polen	790	357	32	57	193	150
Schweden	412	195	28	38	90	61
Vereinigtes Königreich	1.763	520	166	196	478	403



Germany



Total



3.539

932 
up to 9 employees

259 
10 to 19 employees

373 
20 to 49 employees

1.057 
50 to 249 employees

917 
more than 250 employees