

National Economy Sectors of Latvia: Difficulties in Printing and Publishing Industry, Paper and Paper Products Manufacturing and Computer Design Industry. Medium-Term Prospects

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Abstract. The aim of the research is to define export potential, future perspectives and restrictive factors of the sector.

Methods used: monographic approach, document analysis, survey, interviews. The author concludes that the sector has overcome the crisis well. In 2010, the sector turnover was 7.2% from the total turnover of the manufacturing industry, which acknowledges the important role of the sector. The sector has an average export potential. The author considers that for more successful development of the sector, it should be included in the priority segment list of the Ministry of Economy - „Manufacturing industries with a considerable investment in increase of added value and export, and with a high growth and export potential in the future”.

Keywords: printing, publishing, sector, export potential, medium-term prospects, labour force.

I. INTRODUCTION

In October 2009, Ministry of Economy published the Informative Report On The Medium-Term Policy Directions of Economic Recovery, which defined the long-awaited medium-term goals and tasks of Latvian national economy development (by the year 2015), listed the government-supported priority segments and directions thereof, described the major goals and activities aimed at raising competitiveness of the whole national economy, and creating of favourable business environment. Not a single crisis management strategy has been applied during the years of crisis in Latvia. Consequently, the way out of the economic recession is not being directed purposefully; instead, it runs in an unorganized and self-development manner. Therefore Latvia is facing the sequences of the recession, i.e., unemployment rate reaching up to 15 % in the certain regions in 2010. At the same time, there are sectors thirsty for skilled workers. On December 1st, 2010, National Education Development Agency in collaboration with Latvian Employers' Confederation and Free Trade Union Federation of Latvia, as well as with National Education Content Centre and State Education

II. NOTION OF PRINTING INDUSTRY AND TYPES OF PRINTING PRODUCTS IN LATVIA

In any country, development degree of printing industry and related branches is indicative of not only its technical advance but – to a great extent – also the economic and intellectual

Quality Service has initiated implementation of the European Social Fund project „Development of Sectoral Qualifications System, And Increasing the Efficiency and Quality of Vocational Education”. The major goal of this project was to form a permanently working quality system providing proper content of vocational education to meet development needs of the sector. The project will last until November 30th, 2013. One of the goals of the project to be completed between 2011 and 2012 is a research of 12 particular sectors including printing and publishing, paper and paper products manufacturing and computer design industries, and to define demands of labour market. This research offers current vision of the sector by sectoral professionals and a national coordinator of the project representing the Latvian Employers' Confederation; it defines problems of the sector and medium – term development prospects. Though printing and publishing, paper and paper products manufacturing and computer design industries are not found among the priority or special support sectors on the list of the Ministry of Economy, the author would like to suggest that the sector has overcome the crisis well and keeps growing. The goal of the research is to study types of printing products in Latvia, the role of the sector in manufacturing industry, to define the export potential of the sector and the impeding factors. To reach the goal, the following tasks were set:

- study information on the sector on the basis of statistical evidence and data of nongovernmental organizations representing the sector;
- survey experts and/or professionals from the sector on problems and development of the sector, as well as export prospects thereof;
- draw conclusions and develop suggestions for rising of the sector's medium-term competitiveness.

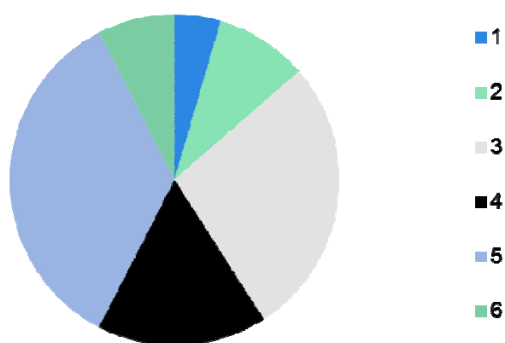
Methods applied in research: monographic approach, document analysis, survey, interviews.

growth thereof. The domestic demand is closely associated with both purchasing power of population and financial status of companies. People afford to buy books and subscribe to the press just after they have managed to cope with urgent payments. The same applies to companies forced to reduce expenses on marketing and various representation costs under austerity measures.

The notion of printing industry covers a large body of sectors which include:

- Printed press products (books, periodicals, advertising, etc.);
- Paper products manufacturing (cardboard wrapping, labels, office supplies, etc.);
- Pre-processing of printed press products (artwork, layout design, construction, etc.).

Particularly good development prospects are put into question for printing and publishing industry, manufacturing of paper and paper products in Latvia. Definitely, companies will have to go in line with changes in clients' demand in terms of colourfulness of products, performance deadlines, and rendering a range of additional services. Digital printing technology is expected to be more widely used in production of smaller runs of printed press products. Like all over the world, volumes and runs of printed newspapers shrink also in Latvia as a result of competition from the internet, and those are likely to be cut even more. The steady growth trends in terms of both quality and quantity are anticipated in the field of wrapping and labels also in the coming years.



1 - newspapers (5%; LVL 6 mil.);
2 - magazines (9%; LVL 12 mil.);
3 - books (27%; LVL 36 mil.);
4 - advertising (17%; LVL 22 mil.);
5 - wrapping and labels (35%; LVL 46 mil.);
6 - other products (8%; LVL 10 mil.)

Fig.1 Break-down by types of printed press products in Latvia in 2010

Source: (data of Latvian Printers' Association - LPUA).

II. A BRIEF HISTORY AND DEVELOPMENT OF THE SECTOR

Records on the most ancient books on the territory of Latvia date back to the 13th century. The Livonian Chronicle written by Henricus de Letti in Latin is deemed to be the first book written in Latvia. The book reflects history of conquering of this area from the crusaders' angle of view. In the 14th and 15th centuries, with economic influence of Latvians growing, records in the Latvian language appeared. One of the greatest world discoveries – Gutenberg's printing technology – started its spreading in the 80s of the 16th century in our country.

Publishing of books and printing press industry grew throughout the following centuries. One of the most notable events having recorded the name of Latvia in world's printing industry history is the first edition of the world-famous Imanuel Kant's "Critique of Pure Reason" that was printed

right here in Latvia - in Stefenhagen's Printing House in Jelgava City.

Publishing of books and printing houses truly blossomed between the 20s – the 30s of the 20th century, when Latvia was the second in Europe in terms of books published per 100,000 inhabitants, just staying behind Denmark. The notable publishing houses of this period such as – *Zelta ābele*, *Grāmatu draugs*, *Anša Gulbja*, *Jāņa Rozes* etc. – and print shops, where editions thereof were produced, laid the fundamentals for high culture of publishing and graphic arts in Latvia.

During the soviet period, print shops acquired new equipment comparatively rarely therefore technical supply and quality of available materials lagged far behind that of other contemporary printing houses in the world, for plenty of years. Nevertheless, skills of graphic arts workers in Latvian publishing houses were highly valued in the Soviet Union. Printed press products made in Latvia gained appreciation in different competitions organized in the Soviet Union.

As soon as Latvia restored its independence in the 90s of the 20th century, a rapid privatization of Latvian publishing companies took place. The new owners made considerable investments in the purchase of new, modern equipment and construction of appropriate industrial buildings. Up to early 2011, investments amounting to nearly 85 million lats have been made into production companies of the sector. Certainly, this was reflected also by the increase in production volumes; during the time period ever since 1997, annual turnover of the sector has quadruplicated. Over the entire said period, except for 2009 when printing and publishing sector was also heavily hit by the economic crisis, the total rates of the sector grew significantly.

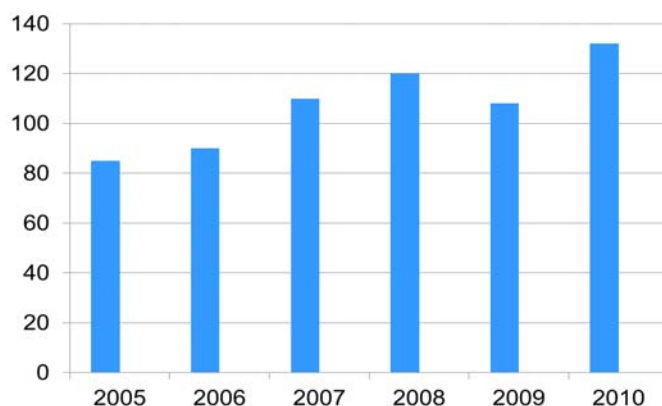


Fig.2 Annual growth of production volumes of publishing and printing products

Source: LPUA data

IV. ROLE OF THE SECTOR IN LATVIAN MANUFACTURING INDUSTRY

(data of Latvian Ministry of Economy)

It is difficult to give an exact number of companies operating and people employed in the sector. According to data of the Enterprise Register of the Republic of Latvia, lots of companies define their type of business as publishing and

rendering of graphic arts services. In fact, these companies are not engaged in production, they are rather agents in these fields. Latvian Printer's Association (LPUA) provides data suggesting that we can speak about 350 companies really operating in printing industry, and about 4,300 workers employed. Latvian graphic arts workers are in a privileged position to a certain extent, since – as it is known – machinery employed in print shops requires considerable investments, and usually it is operated for a very long period of time. In the 90s of 20th century, Latvian companies were forced to start establishing their enterprises from zero, and now those are equipped with the latest machinery and technologies.

Over the recent years, new plants were installed and almost fully completed with the latest machinery by the companies Livonia print, Jelgava Printing House, Press House Baltic, S&G, Liepajas Papirs, The Mukusala Printing Group, Stora Enso Packaging, Design and Printing House, etc.. Substantial investments in modern equipment were also made by the companies VG Kvadra Pak, UnitedPress Printing House, Printing House "Latgales druka", Talsi Printing House, ADverts, Tipo print, Imanta, Rene print, Veiters Corporation, Dardedze Holography, etc. printers.

V. WHERE NEW PROFESSIONALS OF THE SECTOR ARE TRAINED?

Currently, specialists of the publishing and printing sector are trained just at Printing and Publishing Industry Centre of Riga State Technical College, in Latvia. In four years, the students – along with the secondary education - obtain profession of printed materials designer, offset printer, graphic arts technician, and printed materials post-processing specialist. Secondary school graduates are offered an opportunity of acquiring the profession of printed materials digital designer in 1.5 years. The sector employs also advertising and computer design specialists having acquired the secondary vocational and higher education at the educational establishments subordinated to the Ministry of Culture. Graduates of these educational establishments have sufficient artistic level and high creative potential, yet they lack knowledge of specific graphic arts technologies required in pre-processing of printed press materials.

Education provided by the Printing and Publishing Industry Centre of Riga State Technical College enables the graduates to start working in printing companies successfully. However, they should take into account that machines employed in the production are very complicated technologically, and serious additional training is required before working on them skilfully. Unfortunately, the training centre cannot provide practical training of the students fully, as it does not have production facilities meeting the latest demands. Almost the whole process of obtaining the practical work skills is organized in the companies during field practice of the students. This issue is expected to be treated in the next few years during implementation of the ERAF project "Modernizing of training facilities and infrastructural improvement of Riga State Technical College" providing construction of a field training centre and equipment thereof by the latest graphic arts machinery, in Riga, at 64 Darziema Street. Printing and Publishing Industry Centre of Riga State

Technical College implements several more projects aimed at updating and improving of contents of studies and methodological materials, as well as improving of theoretical knowledge and practical competencies of teachers of vocational subjects and practice managers providing also in-service training of teachers with the best companies of the sector.

During joint implementation of the ESF project "Development of Sectoral Qualifications System, And Increasing The Efficiency and Quality Of Vocational Education", the National Education Content Centre, Latvian Employers' Confederation and Free Trade Union Federation of Latvia have established a council of experts of publishing and printing, paper and paper products manufacturing, and computer design sector. The council has set to its work quite recently, and - during the first meetings - has realized the urgency of remarkable improvement of students' training quality in the current programs, and development of new programs, and in the training of raw-materials purchase specialists and trade agents of printed press products.

In overall, a big problem is caused to the sector by the fact that university degree in printing and publishing specialties cannot be obtained in Latvia. Companies employ just a few professionals having acquired their higher education at Moscow or Lvov universities. The bulk of senior managers and engineering personnel have gained their knowledge through self-education, at various training courses arranged by equipment suppliers, and during in-service training in the production companies.

On January 4th, 2011, an agreement between Latvian Printers' Association and the Latvian Investments and Development Agency was signed on implementation of the project "Improving of labour force qualification in Latvian printing and wrapping sector", enabling the sector's companies to provide training to their staff by using funds of the European Social Fund beside their own financial means; the sector's companies take advantage of this opportunity quite eagerly.

VI. EXPORT POTENTIAL OF THE SECTOR, FUTURE PERSPECTIVE, AND IMPEDING FACTORS

On the whole, printing and publishing industry and paper products manufacturing have the following typical features in Latvia:

- high added value;
- modern equipment;
- strong export potential;
- prestigious production;
- qualified labour force.

The listed advantages are the promoters of the high export potential of Latvian publishing and printing industry. In 2010, the sector exported 55% of the production. Indices of the first half of 2011 allow to hope that this rate will grow and exceed 60%. There are several companies in the sector (*Livonia print, UnitedPress Printing House, Press House Baltic, DPN, etc.*), exporting nearly 90% of the printed press products manufactured.

Moreover, it should be stressed that quality and prestigious printed press products with high added value are exported –art books and photo albums, tourist guides, illustrated magazines,

exclusive wrapping (for sweets, perfumery, medicine), and labels.

TABLE 1
PERFORMANCE RESULTS OF THE LARGEST COMPANIES OF THE SECTOR IN 2010*

No.	Company	Turnover, mil. Ls	Export, mil. Ls
1.	Stora Enso Packaging	20.31	11.60
2.	Livonia print	14.70	14.70
3.	PGM	9.20	2.30
4.	Press House Baltic	6.80	6.00
5.	Tehnoinform	6.30	5.40
6.	VG Kvadra Pak	5.00	3.00
7.	Jelgava Printing House	3.80	1.30
8.	Liepajas Papirs	3.60	1.60
9.	Dardedze Holography	3.19	0.68
10.	Veiters Corporation	3.05	1.50
11.	United Press	2.30	2.20
12.	Fenster	2.00	0
13.	ADverts	1.90	0.70
14.	Krauklitis	1.25	0.65
15.	Tipo print	1.,05	0.45
16.	Printing House „Latgales druka”	0.95	0
17.	McAbols	0.77	0
18.	Talsi Printing House	0.73	0

Quality of the production is strongly supported by the fact that the major export markets of Latvian printing and publishing industry products are the Western countries with traditionally high level of printed works and corresponding requirements – Norway, Denmark, Sweden, Iceland, Germany, the Netherlands etc.

Nowadays, publishing companies throughout the world, irrespective of their location, undergo significant changes in technologies, information transmission methods, and global competition. The same applies in full to printing industry of Latvia, too. The major hallmarks traced by the sector for medium-term development are the following:

- Globalization

The convenient options of sending files electronically, on-line editing of texts and approving of colour proof sheets have lessened importance of a print shop location. Earlier, print shops held the composed matter and films; therefore it was logical that printing was performed by the same company. Today customers normally prepare the material subject to printing on their own, and may choose to forward it for printing to any place around the world. Thanks to this option, printing houses of Latvia such as Livonia Print, UnitedPress Printing House, The Mukusala Printing Group, The Press House Baltic, Jelgava Printing House, VG Kvadra Pak, etc. produce printed press products for export successfully.

- Colourfulness of printed press products
Currently, colour products account for nearly 60% share within the gross volume of printed press products, yet it is forecasted to grow by 85% in 2020. It is not just for printing houses. Marketing documents are printed more often on ink-set or toner technology colour printers.

- Digitalization
Dropdown of runs, personalization of printed press products, work performance speed, and good balance between price and equipment output capacity are the major advantages of digital printing. Digital printing cannot replace offset printing, but it should be borne in mind that a part of clients will be enticed thereby in the future.

- Supplementary service to customer
Companies able to offer supplementary service to customers – mail processing and delivery, maintenance of order processing and performance systems, data base upkeep – already gain current benefits, and will have even more remarkable privileges in the future. Considerable investments are required to render these services but those will certainly pay off in the future.

- Diversity of materials
Paper is just one of the numerous printing materials. There is a vast diversity of materials at present, in wrapping field especially – various sorts of plastics, textile, wood, tin. This should be reckoned with in the future.

- Growing performance speed
As runs shrink and customers' demands for performance speed grow, printing houses must be prepared for extremely short terms of order delivery. Studies reveal that during 24 hours, 8% of printing and publishing orders are performed in the world at this moment. Forecasts indicate that volume of such orders is likely to grow by 30% in 2020.

- Full-range service
Clients ordering printing and publishing industry products often expect printing houses to provide full range of service, from design to distribution of the finished product. Moreover, an obligatory requirement is a non-stop exchange of information on the internet. Forecasts indicate that companies capable of providing such service will have definite advantages in the future.

- Triumphal procession of large companies
Rapid growth of large printing and publishing companies is observed globally. The latest technologies are not appropriate for small printing shops applying artisan approach. Small companies will have to invent some extraordinary service, or

* The table includes data provided by the sectorial companies voluntarily at LPUA request.
Source: LPA data

perform exclusive orders with high specific weight of handwork.

Experts of the sector hold the opinion that there are two issues vital for further successful growth of the sector in Latvia:

- 1) reduced tax rate on books;
- 2) campaigning against shady economy.

Reduced tax rate on books is the most essential condition for smooth development of publishing in such a small country as Latvia is quantity wise. The sudden increase of VAT rate from 5% to 21% imposed in 2009 entailed bankruptcy of several publishing houses and cut publishing of books for domestic market for about 60%. In 2010, following the resolution on reduction of the VAT rate (down to 12%, this time) the situation improved substantially. This was an object-lesson demonstrating that government support is required in form of a reduced tax rate to preserve publishing of books in the Latvian language.

The document published by Ministry of Economy „The Informative Report on the Medium-Term Policy Directions of Economic Recovery” set the major goals and activities aimed at raising competitiveness of the whole national economy, and creating of favourable business environment, including improvement of tax policy mentioned by experts of the sector, encouraging goods and services exports, and education. A big problem is caused to the sector by the fact that university degree in printing and publishing specialties cannot be obtained in Latvia. Companies employ just a few professionals having acquired their higher education at Moscow or Lvov universities. The bulk of senior managers and engineering personnel have gained their knowledge through self-education, at various training courses arranged by equipment suppliers, and during in-service training in production companies.

Companies of the sector deem campaigning against shady economy to be an exceedingly important condition for normal competition, and hence for successful development in the future. For this purpose, a cooperation agreement was signed between Latvian Printers' Association and State Revenue Service on enhancing of fair competition and payment of taxes in the sector.

In overall, the Author draws a conclusion that the sector is provided for any possibility to improve and develop in both long-term and medium-term perspective.

VII. CONCLUSIONS

1. Printing and publishing, paper and paper products manufacturing and computer design industries are not listed among the priority or special support sectors by the Ministry of Economy.
2. Printing and publishing, paper and paper products manufacturing and computer design sector has overcome the crisis well and it keeps growing successfully.
3. Against the entire background of the manufacturing industry of Latvia, printing and publishing sector, and paper products manufacturing is at a stable place. In 2010, the sector's turnover amounted to 137 mil. Ls or 7.2% from the total turnover of the manufacturing industry, i.e., 1,922 mil. Ls.

4. The sector has a medium-level export potential with a growing trend. In 2010, the sector exported 55% of the production.
5. The major export markets of Latvian printing and publishing industry products are the Western countries with traditionally high quality level of the printed works and the corresponding requirements – Norway, Denmark, Sweden, Iceland, Germany, the Netherlands etc.
6. For the sector to develop successfully in the future, two issues are vital for Latvia: a reduced tax rate on books, and campaigning against shady economy.
7. A major problem of the sector is the fact that higher education in specialties of printing and publishing industry is not available in Latvia.

Suggestions:

1. Ensure that Ministry of Economy includes printing and publishing, paper and paper products manufacturing and computer design industries into the priority segment „Manufacturing industries with a considerable investment in increase of added value and export, and with a high growth and export potential in the future”.
2. Employ actively results of the research performed in the framework of the European Social Fund project „Development Of Sectoral Qualifications System, And Increasing The Efficiency and Quality Of Vocational Education”, and resolve issues on qualified labour force timely.
3. In order to provide sufficient number of well-trained specialists to the printing industry of Latvia in the coming years, purposeful work on vocational orientation should be done; maintain collaboration with manufacturing companies that would provide appropriate apprenticeship and practice managers to students who have acquired theoretical knowledge; continue implementation of the project „Improving of labour force qualification in Latvian printing and wrapping sector” under the agreement signed between Latvian Printers' Association and the Latvian Investments and Development Agency on January 4th, 2011, enabling the sector's companies to provide training to their staff by using funds of the European Social Fund beside their own financial means.

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Darba mērķis ir veikt pētījumu par poligrāfijas, izdevējdarbības, papīra un papīra izstrādājumu ražošanas un datordizaina nozares lomu apstrādes rūpniecībā, noteikt nozares eksporta potenciālu, nākotnes perspektīvas un kavējošos faktorus. Pielietotās metodes: monogrāfiskā, dokumentu studēšana, aptauja, intervijas. Autore secina, ka nozarē pēc krīzes ir atjaunojusies izaugsme. Nozares apgrozījums 2010.g.bija 7,2% no apstrādes rūpniecības kopējā apgrozījuma, kas liecina par nozares nozīmīguma pieaugumu.

Kopumā poligrāfijas un papīra izstrādājumu ražošanu Latvijā raksturo: augsta pievienotā vērtība, moderna tehnika, spēcīgs eksporta potenciāls, prestiža produkcija un kvalificēts darbaspēks. Uzskaitītās priekšrocības nosaka Latvijas poligrāfijas nozares augsto eksporta potenciālu. 2010. gadā tika eksportēti 55% nozares produkcijas. Nozarei ir vidējs eksporta potenciāls. 2011. gada pirmā pusgada rādītāji ļauj cerēt, ka šis rādītājs paaugstināsies un pārsniegs 60%. Galvenie Latvijas poligrāfiskās produkcijas eksporta tirgi ir Rietumvalstis ar tradicionāli augstu iespaiddarbu kultūru un attiecīgām prasībām – Norvēģija, Dānija, Zviedrija, Islande, Vācija, Nīderlande u.c. Kā problēmu autore min, ka Latvijā poligrāfijas nozarē iespējams iegūt tikai vidējo profesionālo izglītību. Speciālistus sagatavo tikai Rīgas Valsts tehnikuma Poligrāfijas centrā. Veiksmīgai nozares tālākai attīstībai Latvijā ir svarīgi divi jautājumi: pazemināta nodokļu likme grāmatām un citā ar ēnu ekonomiku. Autore uzskata, ka veiksmīgākai attīstībai nozarei ir jāpanāk nozares iekļaušanu Ekonomikas Ministrijas prioritārajā segmentā „Apstrādes rūpniecības nozares ar nozīmīgu ieguldījumu pievienotās vērtības un eksporta pieaugumā, kā arī augstu izaugsmes un eksporta potenciālu nākotnē”.

Инга Шина. Среднесрочные перспективы: трудности в полиграфии и издательском деле, производстве бумаги и бумажной продукции и промышленности компьютерного дизайна в Латвии

Целью исследования является определение ролей отраслей полиграфии, издательской деятельности, производства бумаги и бумажных изделий и компьютерного дизайна в обрабатывающей промышленности, определение экспортного потенциала отрасли, перспектив в будущем и затрудняющих их факторов.

Используемые методы: монографический, изучение документов, опросы, интервью. Автор пришла к выводу, что отрасль восстановила свой рост после кризиса. Оборот отрасли в 2010 г. составил 7,2% от общего оборота обрабатывающей промышленности, что свидетельствует о значительной роли отрасли.

В целом полиграфию и производство бумажных изделий в Латвии характеризует высокая добавленная стоимость, современная техника, сильный экспортный потенциал, престижная продукция и квалифицированная рабочая сила. Перечисленные преимущества определяют высокий экспортный потенциал полиграфической отрасли Латвии. В 2010 году было экспортировано 55% продукции отрасли.

Отрасль имеет средний экспортный потенциал. Показатели первого полугодия 2011 года позволяют надеяться, что этот показатель увеличится и превысит 60%.

Главные экспортные рынки полиграфической продукции Латвии – это Западные страны с традиционно высокой культурой печатных работ и соответствующим требованиям - Норвегия, Дания, Швеция, Исландия, Германия, Нидерланды и др. Как проблему автор упоминает возможность получить только среднее профессиональное образование в Латвии в отрасли полиграфии. Специалистов готовят только в Полиграфическом центре Рижского Государственного техникума. Для успешного дальнейшего развития отрасли в Латвии жизненно важны два вопроса:

пониженная налоговая ставка на книги и борьба с теневой экономикой.

Автор придерживается мнения, что для более успешного развития отрасли должна добиться включения отрасли в приоритетный сегмент Министерства экономики «Отрасли обрабатывающей промышленности со значительным вкладом в прирост добавленной стоимости и экспорта, а также с высоким потенциалом роста и экспорта в будущем»