

Sectoral Study Series



HS 49

Printed Materials

Preface

In light of Lebanon's evolving export landscape, the CER team at CCIA-BML has undertaken a series of sectoral studies to analyze export patterns and identify growth opportunities. These studies aim to provide Lebanese producers with actionable insights and market analyses to help leverage export trends since 2019 and explore potential markets for their products.*

* Wael Al Achkar, Tina Doumit

Executive Summary

According to data from the Chamber of Commerce, Industry, and Agriculture of Beirut and Mount Lebanon (CCIA-BML), the export of printed materials (HS 49) witnessed a decrease between 2019 and 2021 before recovering in 2023. Among the Lebanese products that earned a certificate of origin from CCIA-BML¹, Printed books, brochures, leaflets and similar printed matter emerged as the leading products. Given the global demand for such products, key potential markets for Lebanese exports in this category include Cameroon, United Arab Emirates and different Arab markets. Expanding into these markets presents an opportunity to enhance export and strengthens the presence in the international supply chain markets.

الملخص التنفيذي

وفقاً لبيانات غرفة التجارة والصناعة والزراعة في بيروت وجبل لبنان (CCIA-BML)، شهد تصدير المواد المطبوعة (HS 49) انخفاضاً بين عامي 2019 و2021 قبل أن يتعافى في عام 2023. ومن بين المنتجات اللبنانية التي حصلت على شهادة منشأ من CCIA-BML، برزت الكتب المطبوعة والكتيبات والنشرات والمطبوعات المماثلة كمنتجات رائدة. ونظراً للطلب العالمي على هذه المنتجات، فإن الأسواق الرئيسية المحتملة للصادرات اللبنانية في هذه الفئة تشمل الكامبيرون والإمارات العربية المتحدة وأسواقاً عربية مختلفة. ويمثل التوسع في هذه الأسواق فرصة لتعزيز الصادرات وتعزيز الوجود في أسواق سلسلة التوريد الدولية.

¹ A product earns a Certificate of Origin if it meets the required value-added threshold in the exporting country, allowing it to benefit from trade agreements with the importing country. However, this does not necessarily mean that the product was entirely manufactured in Lebanon.

يحصل المنتج على شهادة منشأ إذا استوفى الحد الأدنى المطلوب للقيمة المضافة في البلد المصدّر، مما يُتيح له الاستفادة من اتفاقيات التجارة مع البلد المستورد. إلا أن هذا لا يعني بالضرورة أن المنتج صُنِعَ بالكامل في لبنان.

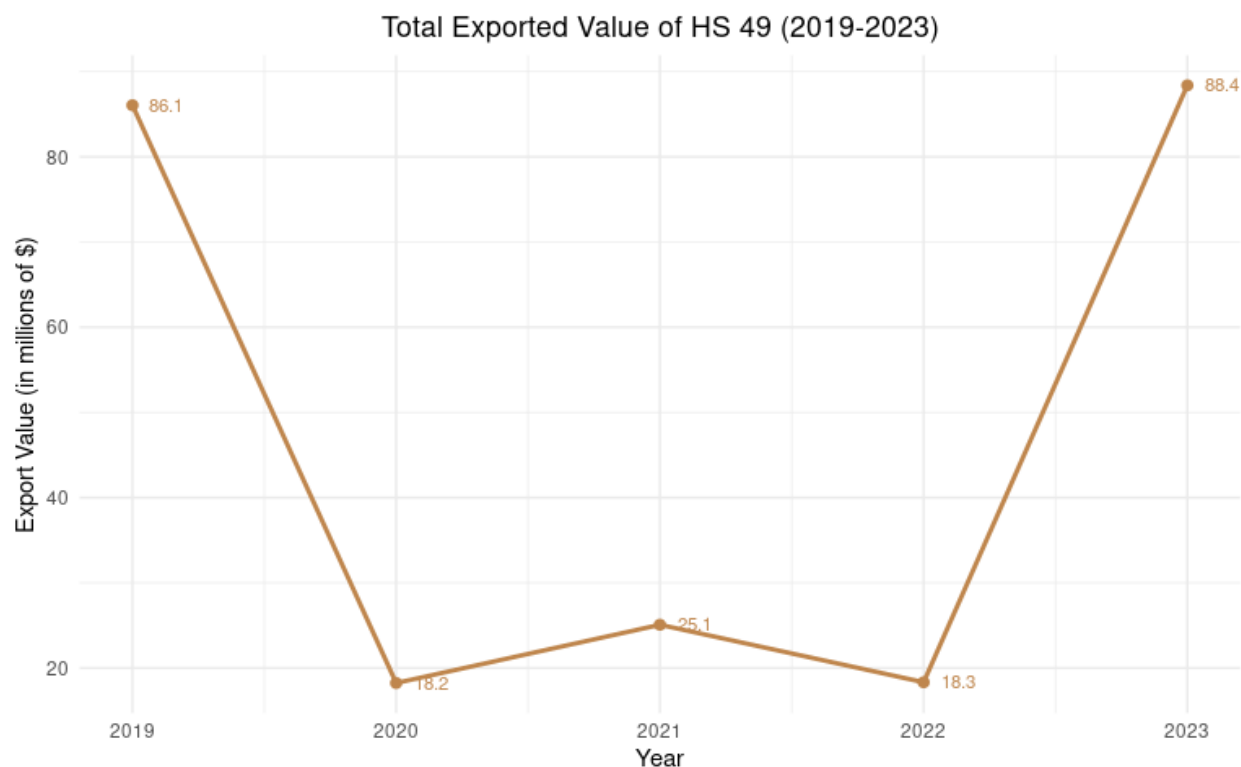
HS 49: Printed Materials

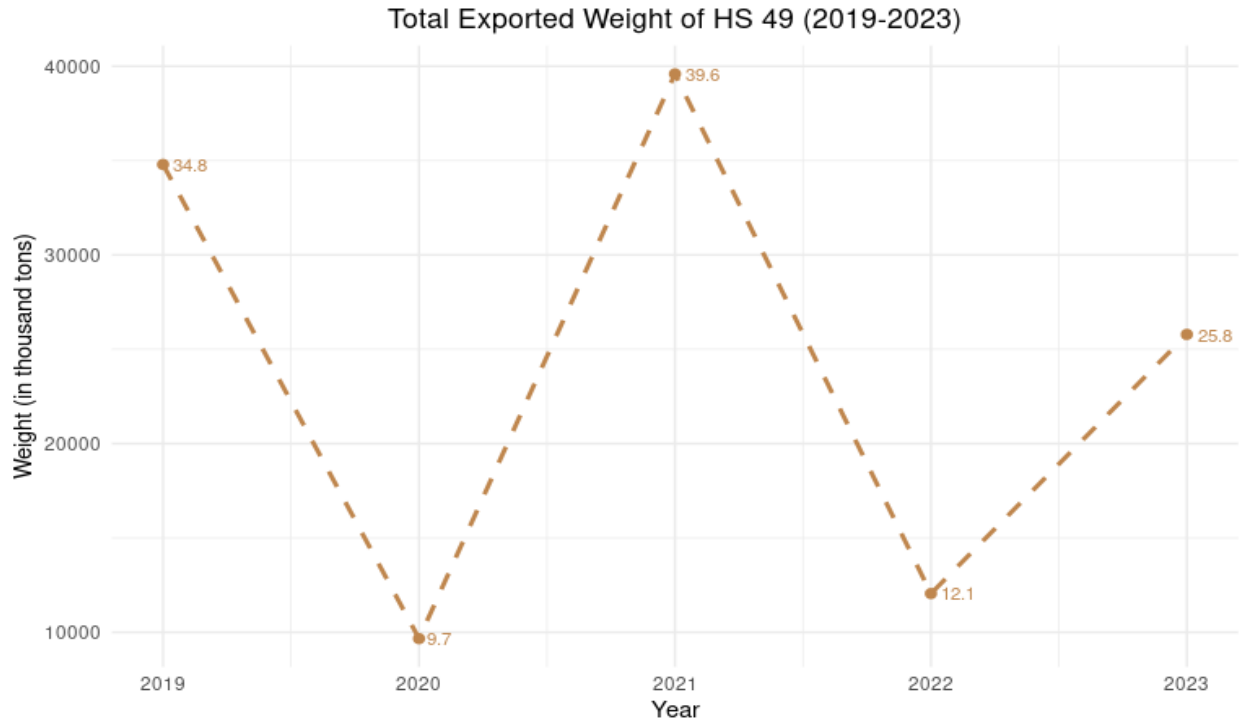
I- General Overview

Printed Materials are the products of the paper industry which includes printed books, brochures, leaflets, newspapers, pictures and maps.

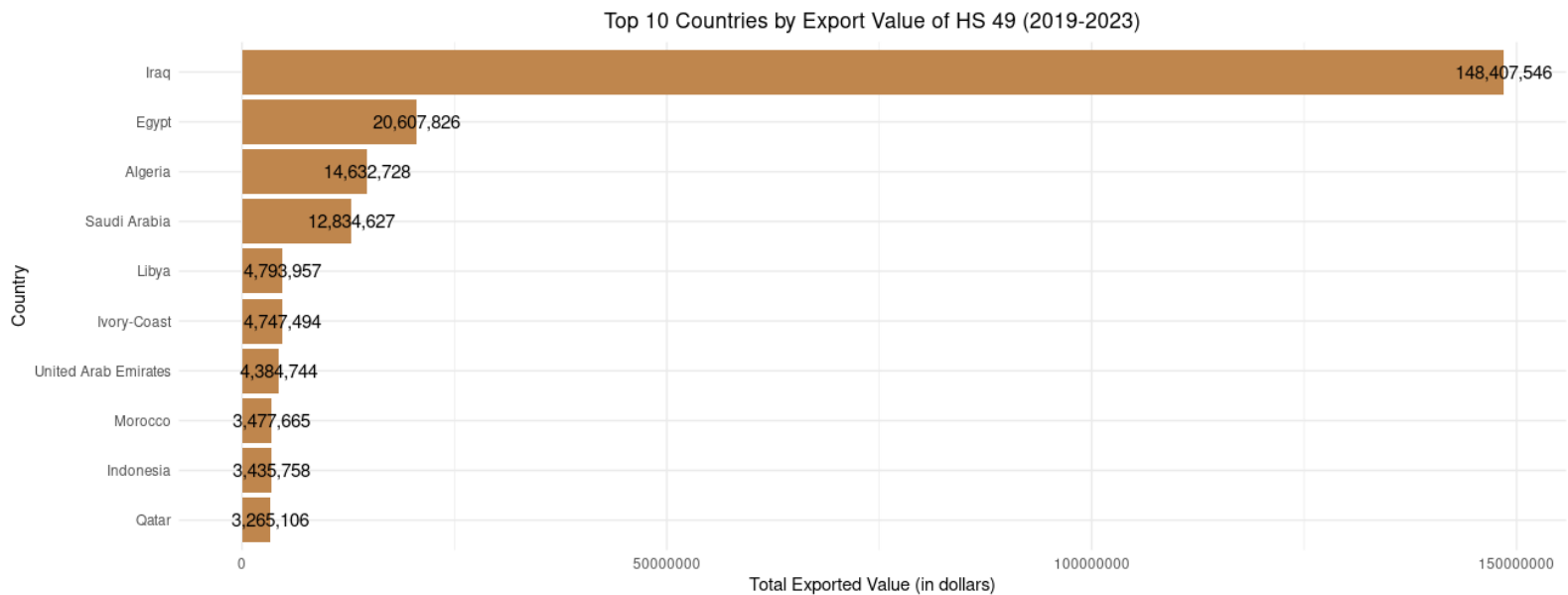
In 2023, the world's export value of printed materials (HS 49) was \$ 37.2 billion. Top exporters were the United States (\$ 4.07 billion), China (\$ 4.05 billion), Germany (\$ 3.5 billion) and the United Arab Emirates (\$ 3.4 billion). Accordingly, the world's import value was \$ 36.6 billion where top importers were the United States (\$ 5.06 billion), Germany (\$ 2.7 billion), China (\$ 2.05 billion) and France (\$ 2.03 billion) ([International Trade Center](#)).

According to the data from CCIA-BML, exports of printed materials (HS 49) that received a certificate of origin and having a Lebanese origin decreased from \$ 86 million in 2019 to \$ 18.3 million in 2022 before increasing to \$ 88 million in 2023.





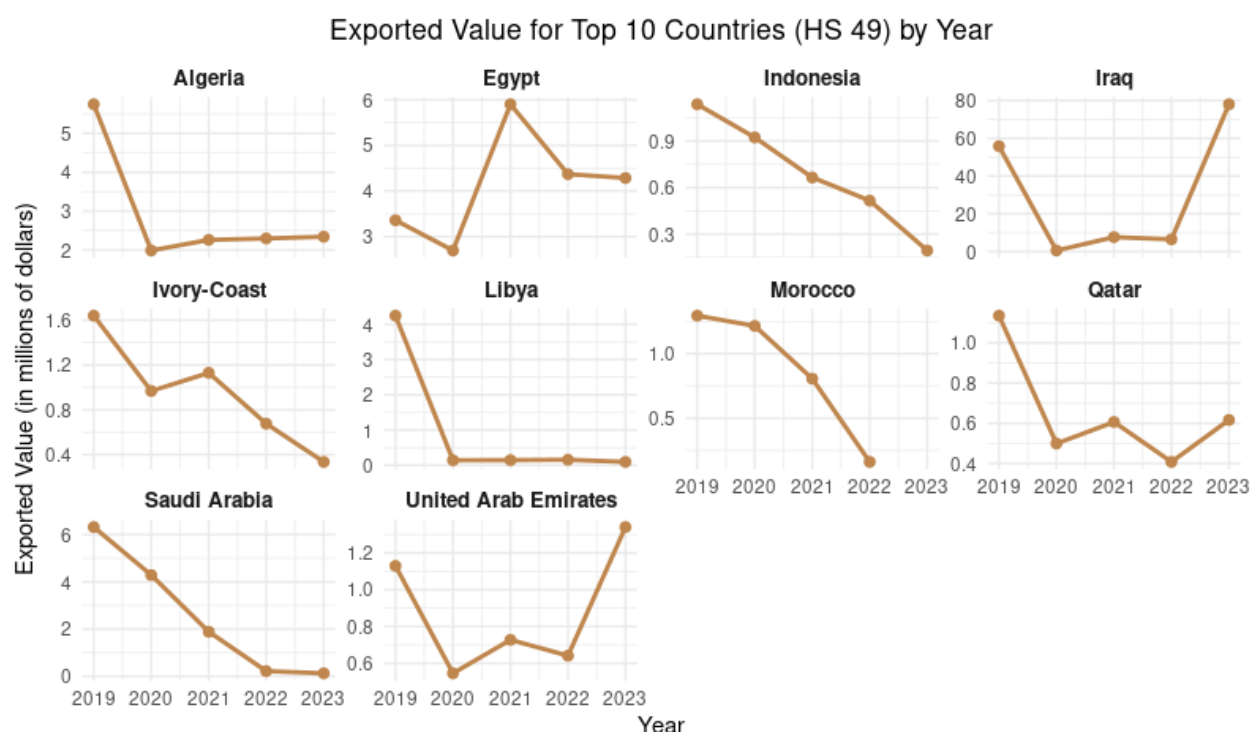
The main destination markets for the Lebanese export of printed materials (HS 49) from CCIA-BML are mainly focused toward Arab countries. The data reveals that Iraq, Egypt, Algeria, Saudi Arabia are among the top markets.



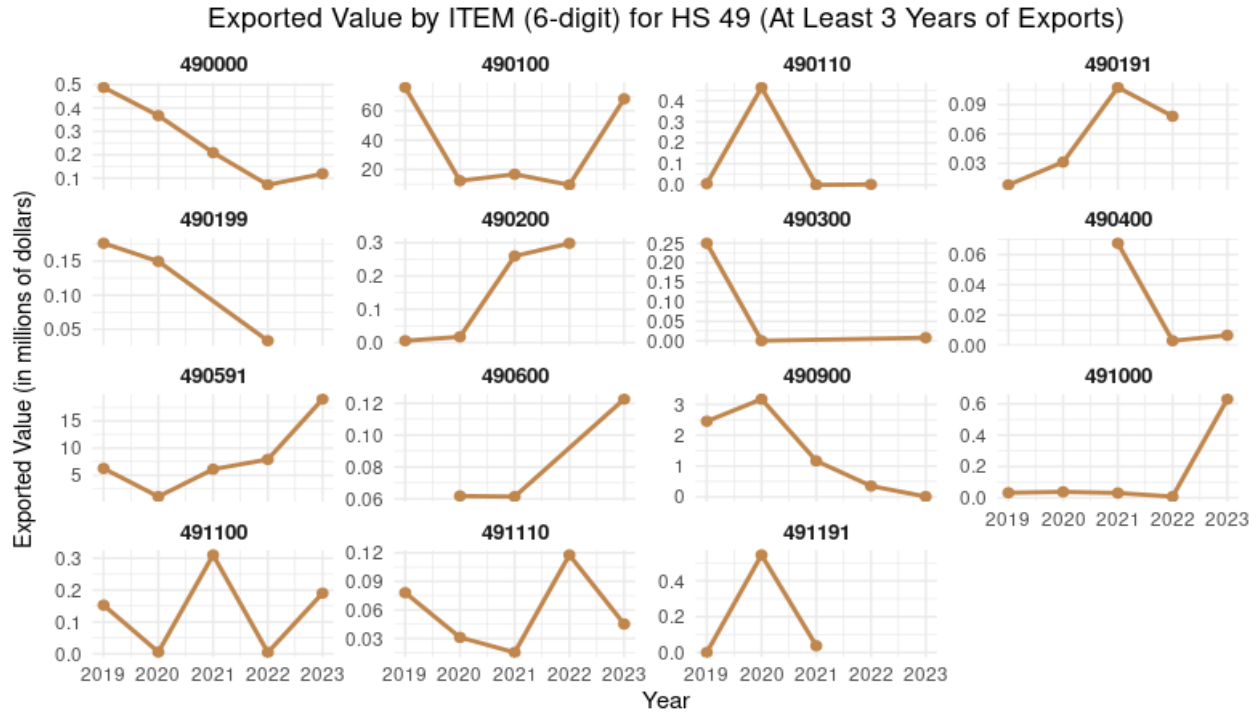
Since 2019, Lebanese exports to the top Arab destinations have been increasing except for Algeria, Morocco, Qatar and Saudi Arabia.

Regarding Algeria, its import from Lebanon has been decreasing by 18% per annum between 2019 and 2023. However, imports from Türkiye and the United Arab Emirates to Algeria have increased by 31% and 19% for the same interval, respectively.

Lebanon's exports of HS 49 to Morocco has been decreasing by 5% per annum between 2019 and 2023 while it decreased by 7% per annum for Qatar in which Turkish imports grew by 11% per annum. Regarding Saudi Arabia, the decrease in exports is related to the ban imposed by the Kingdom on Lebanon in 2021.



According to CCIA-BML data, the main products of printed materials (HS 49) were those that fall under HS 49.01 (Printed books, brochures, leaflets and similar printed matter), HS 49.05 (Maps and hydrographic or similar charts), HS 49.11 (Other printed matter, including printed pictures and photographs) and HS 49.02 (Newspapers, journals and periodicals, whether or not illustrated or containing advertising material).



II- Potential Markets

The following tables provide a detailed breakdown of Lebanon's unrealized export potential² in the printed material sector. These insights reveal untapped opportunities, at an estimated value of more than \$ 10 million for Lebanese manufacturers to expand their access to different markets.

Unrealized Export Potential for Printed Materials

HS Code	Product Name	Country	Unrealized Potential*
49.01.99	Printed books, brochures & similar, not elsewhere specified	Cameroon	1200
		Canada	430
		Congo	721
		Cyprus	695
		Germany	240
		Qatar	239
		Spain	931
		Switzerland	684
		United Kingdom	725
		United States	3000
		<i>Approximate Total</i>	<i>\$8.86 million</i>
49.01.10	Printed books, brochures & similar, in single sheets	Cameroon	262
		Congo	51
		Ghana	106

² An explanation about the export potential value can be found at the end of the study.

		Liberia	146
		Libya	50
		Saudi Arabia	151
		United Arab Emirates	122
		United States	126
		<i>Approximate Total</i>	<i>\$ 1.01 million</i>
49.11.10	Trade advertising material & commercial catalogues	Cameroon	10
		Canada	13
		Greece	11
		Qatar	36
		Saudi Arabia	6
		Switzerland	25
		<i>Approximate Total</i>	<i>\$ 100 thousand</i>
<i>Approximate Total Unrealized Export Potential for HS 49</i>			<i>\$10,000,000</i>

Source: [ITC Trade Map](#)

*m refers to thousands of \$

The table below outlines the regulatory requirements and tariff structures imposed by key destination markets for the products highlighted in the above table.

Product	Country	Number of Requirements to Export	Tariff Imposed
HS 49.01.99 Printed books, brochures & similar, not elsewhere specified	Cameroon	17	0%
	Canada	4	0%
	Congo	N/A	0%
	Cyprus	N/A	0%
	Spain	N/A	0%
	United Kingdom	N/A	0%
	United States	9	0%
HS 49.01.10 Printed books, brochures & similar, in single sheets	Cameroon	17	0%
	Congo	N/A	0%
	Liberia	N/a	0%
	United Arab Emirates	12	0%
	United States	9	0%
HS 49.11.10 Trade advertising material & commercial catalogues	Cameroon	17	30%
	Greece	N/A	0%
	Qatar	14	0%
	Switzerland	3	0%

Source: [ITC Market Access Map](#)

Potential Business Partners

Company	Country	City	Website
Papeterie Louis Torbey Sarl	Cameroon	Yaounde	http://pltorbey.com/
MULTIPRINT SERIGRAPHIE		Douala	https://www.multiprintsa.com
BUROTEC SA	Congo	Pointe-Noire	https://burotec.biz/fr/
Librairie Paillet			librairiepaillet@aol.com
Imagia Sca	Spain	ALMERIA	http://www.imagiaglobal.com
Grupo Manin De Publicidad		Madrid	http://www.manin.es
Arbutus Press	United States	Traverse City	www.arbutuspress.com
First Tape & Label		Texarkana	https://www.firsttapeandlabel.com/
Aims Foreign Language Books		Cincinnati	http://www.aimsbooks.com/

Source: Dun & Bradstreet - Kompas

Other Partners in Lebanon that can Provide Support:

Chamber of Commerce, Industry and Agriculture of Beirut and Mount-Lebanon

Address: CCIA-BML Building, 1 justinien street, Sanayeh| POBox:11 1801 Beirut, Lebanon

Phone: +961 1 353190

Email:dg-office@ccib.org.lb

Trade Point Beirut - Ministry of Economy and Trade

Address: Down Town Lazariéh Bldg Bachoura E6 Beirut 2020-6701

Phone: 01 - 982360/1/2/3/4/5

Email: Info@economy.gov.lb