



Tecnología en color

Grupo **Sánchez**

- 1930 Don Jesús Sánchez inicia operaciones distribuyendo tinta importada
- 1940 Abrimos nuestra primera sucursal en Monterrey
- 1943 Se inicia con la distribución de equipo
- 1946 Empezamos la producción de tintas offset
- 1953 Se dio inicio a la producción de tintas líquidas
- 1970 Llevamos a cabo nuestras primeras exportaciones
- 1976 Comienza la producción de tintas para serigrafía y distribución de materiales
- 1994 Sociedad con Coates Lorilleux (48%)
- 1996 Instalamos nuestro primer implant offset
- 1997 Empieza la producción de barniz UV
- 1999 Primer implant de tintas líquidas
- 2000 Certificación SGS ISO9001
- 2001 Recompra de acciones a Coates Lorilleux
- 2003 Apertura de Sánchez Centroamérica en El Salvador
- 2007 Compra de nuestro principal competidor Prodaplac dedicada a las tintas offset
- 2013 Se inaugura la nueva Planta en Tepeji del Rio, Hgo., 40,000m<sup>2</sup> adicionales
- 2014 Se terminan todas las etapas de nuestra nueva Planta en Tepeji del Rio, Hidalgo

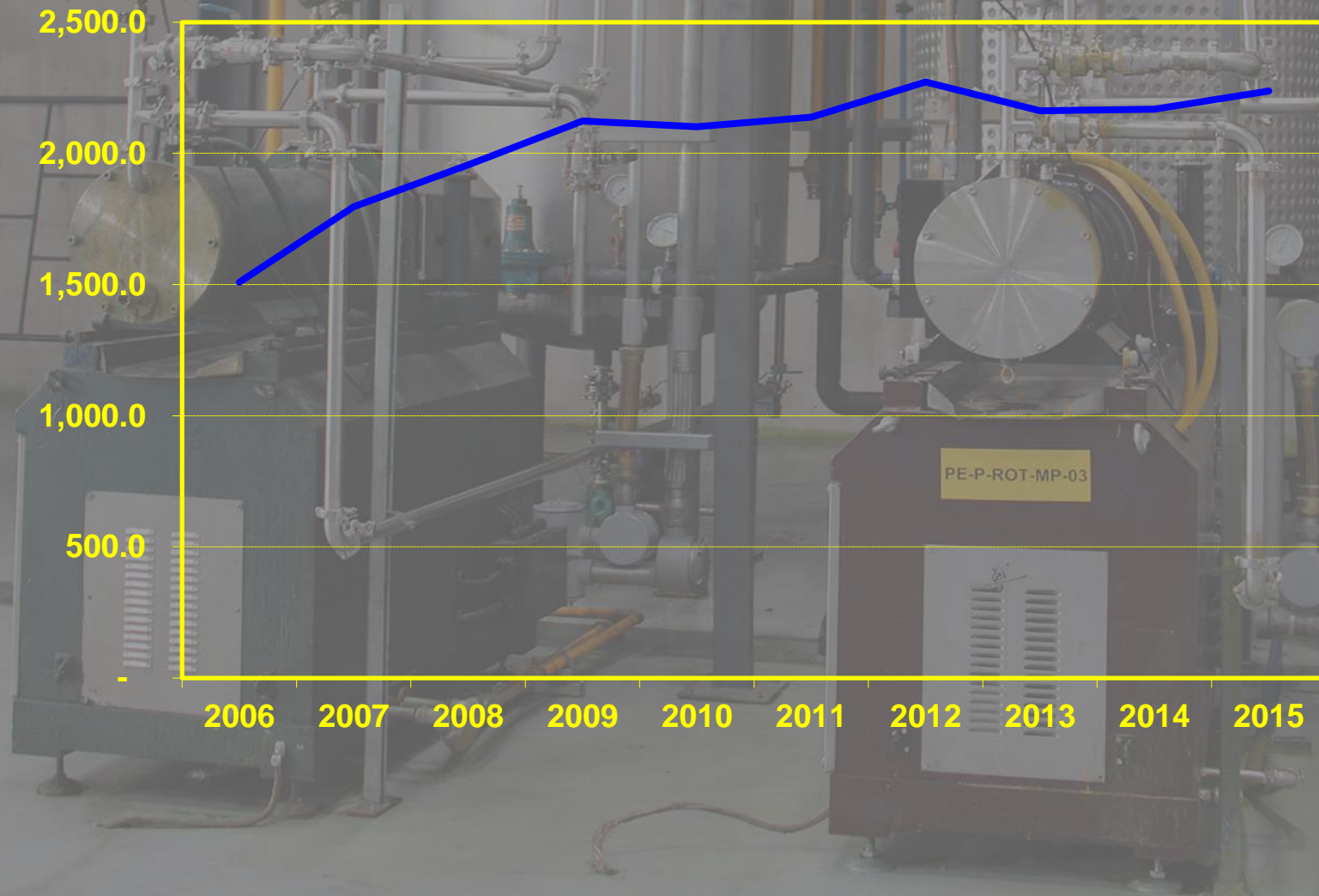


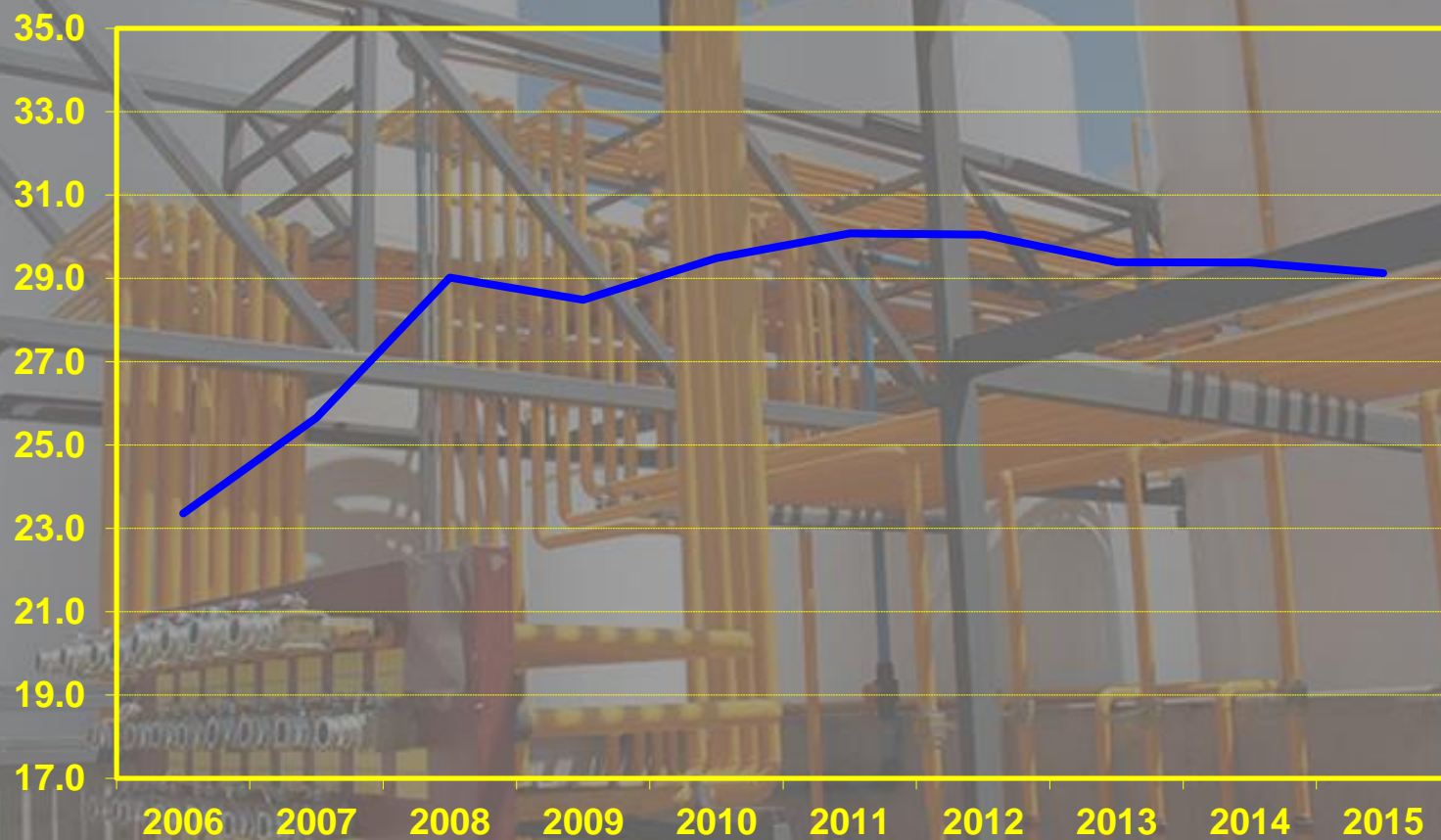
Ser un proveedor de tecnología eficiente en la Industria Gráfica, contribuyendo al bienestar de nuestros colaboradores y accionistas.











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**Grupo Sánchez**

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Sales: \$126.2 million (inks); \$162.9 million overall.

**Major Products:** Offset, flexo, gravure and screen inks, overprint varnishes, offset plates, pressroom chemicals and offset presses.

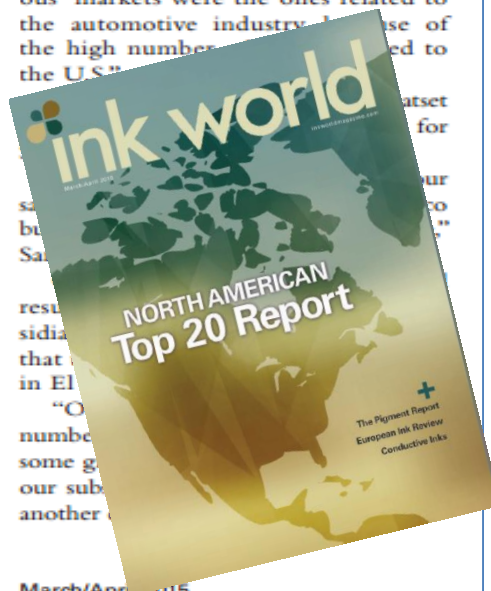
**Key Personnel:** Ernesto J. Sanchez, managing director; Jose Sanchez, commercial director; Jesus McKelligan, operations director; Alvaro Toledo, administrative director; Salvador Duran, technical manager (paste inks); Agustín Lozano, technical manager (liquid inks).

**Number of Employees:** 1,150

**Comments:** Sanchez SA de CV is the largest printing ink manufacturer in Mexico and Central America, expanding its operations with subsidiaries in El Salvador (Sanchez Centroamerica), Guatemala (Tintas Sanchez Guatemala SA), Costa Rica. In 2012, the company moved into Colombia, adding Grupo Sanchez Colombia.

While the Mexican economy did not show economic growth during 2014, Sanchez SA de CV was able to maintain steady sales due to its regional expansion. The company recorded \$126.2 million in ink sales in 2014, and overall sales of \$162.9 million, which was relatively similar to 2013's results.

"Mexico experienced another disappointing year, where the economy grew only 2%, way under what was expected, becoming another difficult year for President Pena Nieto's administration," said Ernesto J. Sanchez, Sanchez SA de CV's managing director. "In addition to our slow economy, our Mexican peso suffered a considerable devaluation against the U.S. dollar, increasing the cost of the materials the country imports. The most 'vigorous' markets were the ones related to the automotive industry because of the high numbers recorded in the U.S."



March/April 2015

## North American Top 20 Report

# The North American Top 20 Rankings

Company	North American Ink Sales (in millions)	Global Ink Sales (Parent) (in millions)	Last Year
1. Sun Chemical	\$1,500*	\$3,500 (Sun Chemical)**	1
2. Flint Group	\$1,000*	\$2,900 (Flint Group)	2
3. INX International	\$375	\$1,340 (Sakata INX)	3
4. CR/T	\$250*		4
5. Siegwark	\$200	\$1,330 (Siegwerk Group)	5
6. DuPont Ink Jet	\$175*		6
6. Wikoff Color	\$175*		7
8. Hostmann-Steinberg	\$150	\$1,080 (Huber Group)	8
9. Sanchez SA de CV	\$126		9
10. American Inks & Coatings	\$115		11
11. EFI, Inc.	\$110*		11
12. Toyo Ink America	\$105	\$1,440 (Toyo Ink)	10
13. Fujifilm North America, GSD	\$90*	\$375* (Fujifilm)	13
14. Nazdar	\$75*		14
15. Central Ink	\$65		15
15. Sensient Technologies	\$65		19
17. SICPA Securink	\$60*	\$400* (SICPA Group)	16
17. Superior Ink	\$60		16
17. Van Son	\$60*	\$130* (Royal Dutch Van Son)	16
20. Ink Systems	\$50		19
20. International Paper	\$50*	NA	

\* Ink World estimate

\*\* Parent company DIC Corporation has global sales of \$6.71 billion.

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EFI, Inc.	p. 50	Siegwerk	p. 44
Flint Group	p. 36	Sun Chemical	p. 34
Fujifilm North America, GSD	p. 52	Superior Printing Ink	p. 56
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Ink Systems	p. 57	Van Son	p. 56
INX International	p. 39	Wikoff Color	p. 46
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Overall, Sanchez SA de CV was able to maintain steady sales due to its regional expansion in 2014. The company recorded \$126.2 million in ink sales in 2014, and overall sales of \$162.9 million.

While the Mexican economy did not show economic growth during 2014, the economy did pick up during the first half of 2015, driven by the national election.

"In Mexico, we experienced fairly good economic growth for the first half of 2015, some of it because the

mid-term elections were held on June 6," said Ernesto J. Sanchez, Sanchez SA de CV's managing director. "My concern, and some analysts agree, is that we might experience a slow economy in the second half of the year. The amount of money expended during the election is incredible, and that is all gone. Regarding elections, I must say that screenprinting has always been one of the ink systems that sees more benefit during elections, and this time was no exception.

"Overall, the Pena Nieto administration has been deceptive, with economic expansion much lower than promised, and safety and violence issues far from being solved," he added. "Mexico experienced another disappointing year, where the economy grew only 2%, way under what was expected, becoming another difficult year for President Nieto's administration. In addition to our slow economy, our Mexican peso suffered a considerable devaluation against the U.S. dollar, increasing the cost of the materials the country imports."

Sanchez noted that the heatset ink market was particularly strong for Sanchez SA de CV.

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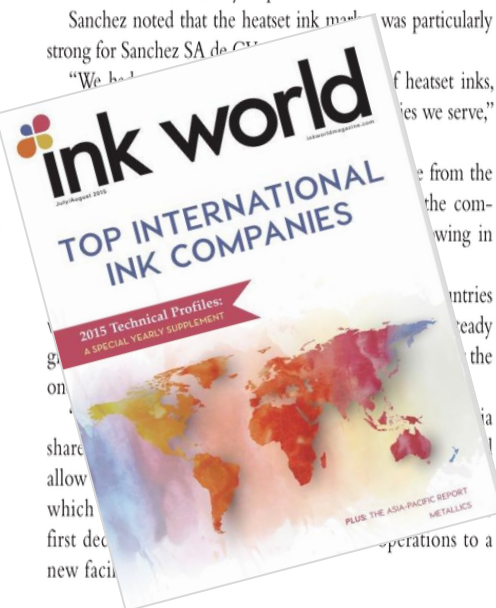
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## The International Top Companies



## Global Ink Industry Leaders Face New Challenges

The changing nature of the printing industry remained the focus in 2014. Generally speaking, the packaging, inkjet and UV printing segments continue to grow globally, while publication and commercial printing markets are sluggish at best.

Global markets continue to shift, too. The Asia-Pacific, Latin America and Eastern European markets are expanding, while North America and Europe are more mature markets. In contrast, the raw material business, which has had significant supply and cost issues in recent years, remained stable for the most part, although at a higher level than ever before.

Major currency fluctuations were the largest change this year for ink manufacturers. Consider this: On Jan. 1, 2014, the euro was worth \$1.38, and the yen was \$0.00952; by Jan. 1, 2015, the euro had declined to \$1.21 (it dropped further to \$1.12 as of July 1, 2015, a 19% drop from the beginning of 2014). Meanwhile, the yen dropped to \$0.00836 (\$0.00817 as of July 1, 2015, a 14% decline). That dramatically affects purchasing power for raw materials, which then impacts margins if ink manufacturers cannot pass these changes along to printers.

There are many challenges ahead for the printing ink industry, and as our Top International Ink Companies Report shows, companies are experimenting in an effort to expand their sales. Whether it is through developing products for new printing segments, adding new operations in growing geographical markets or launching new products, ink manufacturers create new opportunities for growth. These changes will ultimately be the key to their success in the coming years.

*David Savastano*

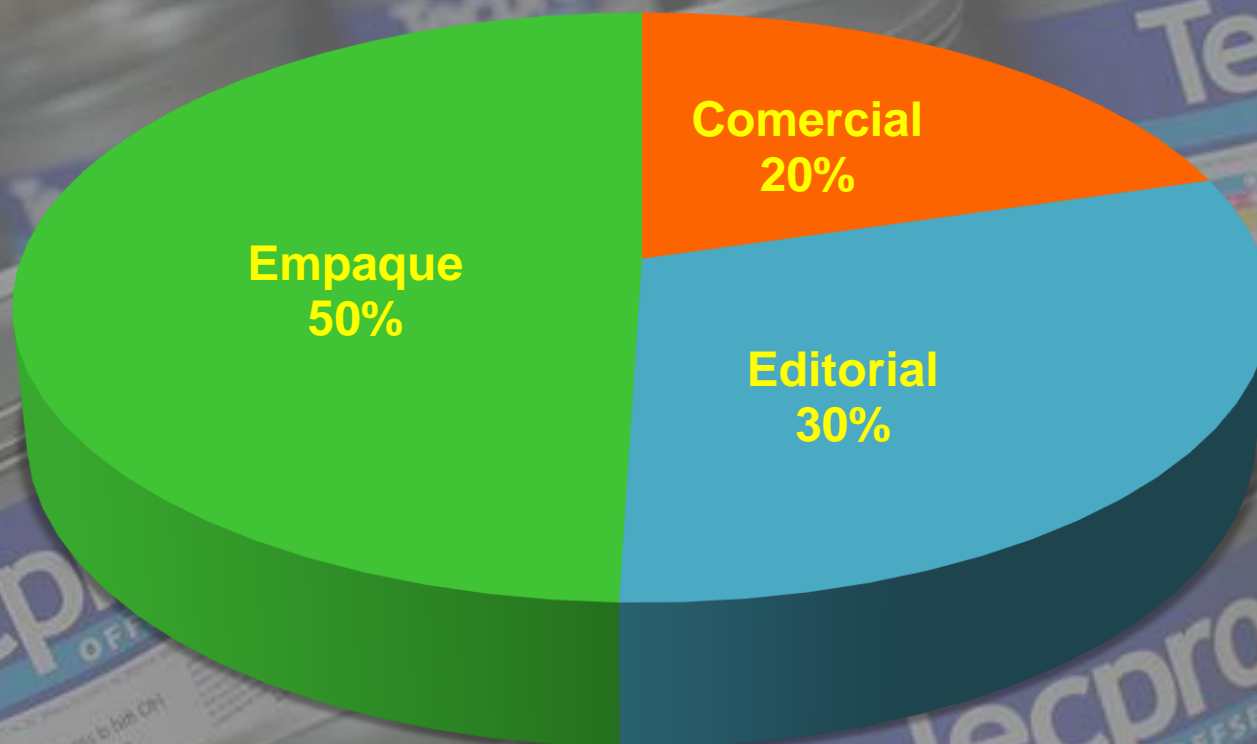
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## The Top International Ink Companies (Ink and Graphic Arts Sales)

DIC/Sun Chemical	\$3.47B
Flint Group	\$2.90B
Toyo Ink	\$1.41B
Sakata INX	\$1.30B
Siegwerk Group	\$1.1B
Huber Group	\$1.02B
T&K Toka	\$405M
SICPA	\$400M*
Tokyo Printing Ink	\$400M
Fujifilm North America	\$375M*
ALTANA AG	\$300M*
Dainichiseika Color	\$246M
Yip's Chemical Holdings	\$207M
Eppl Druckfarben	\$195M
Wikoff Color	\$175M*
Royal Dutch Van Son	\$130M*
<b>Sanchez SA de CV</b>	<b>\$126M</b>
Xinxiang Wende Xiangchuan	\$100M*
Zeller+Gmelin	\$100M*
Letong Chemical	\$95M*
Daihan Ink	\$87M
DYO Printing Inks	\$55M*
Chimigraf Iberica	\$50M
RUCO Druckfarben	\$47M

\* Ink World estimate





- Capacidad de investigación y desarrollo
- Evaluación permanente de tendencias de mercado, requerimientos de los impresores, materiales a ser impresos y materias primas
- Servicio técnico por medio de personal capacitado y experimentado
- Certificaciones
- Especialización por segmento:
  - Offset comercial, editorial y empaque
  - Flexografía y rotograbado empaque flexible y rígido
  - Serigrafía envases y textil
  - UV comercial y empaque



- Dos Plantas
  - Ciudad de México 24,000m<sup>2</sup> especializada en offset
  - Tepeji 40,000m<sup>2</sup> especializada en tintas líquidas y serigrafía
- Centros de Servicio
  - Bogotá en Colombia
  - Culiacán
  - Guadalajara
  - Guatemala en Guatemala
  - Monterrey
  - San José en Costa Rica
  - San Salvador en El Salvador
- 37 Inplants



[Ver video](#)



- Offset
  - Mantillas Day
  - Químicos para prensa Varn
  - Placas Kodak
- Serigrafía
  - Mallas
  - Películas y químicos

- Estructura comercial especializada
- Técnicos capacitados
- Stock de refacciones
- Marcas representadas
  - Compaginadoras y encuadernadoras Baum
  - CTP's flexo y offset Kodak
  - Guillotinas Perfecta
  - Prensas Komori
  - Pegadoras y suajadoras Brausse
  - Impresoras digitales Kodak y Konica