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The Chinese Printing Market: The Next Big Opportunity for Digital Printing & Workflow

Report Fast Facts

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About Us

InfoTrends, a Questex Company, is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industries. We provide research, analysis, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses. To learn more about our company, visit **www.infotrends.com.**

Introduction

The Chinese economy continues to show high growth rates. Real GDP growth in China for 2006 was estimated at 10.5% over 2005. The printing industry in China is growing at a much higher rate than mature economies such as North America, Japan or Western Europe. Estimates of growth in printing revenue vary but are in the upper teens compared to the low single digits.

This growth in the China market presents significant opportunities and threats. For equipment and supplies vendors, it represents an opportunity for incremental growth and higher net revenue growth than advanced economies will offer. For print service providers in mature economies, it represents new competition and new opportunities for partnerships.

The goal of this study is to provide a comprehensive view of the China production printing market and the opportunity for digital printing technology. In addition to evaluating the current sate of the Chinese printing market, we have developed a forecast through 2010 that is consistent with our existing digital printing and industry forecasts. The goal of the study is to enable subscribers to gain a solid understanding of China's market structure and opportunity.

We examined the full range of the production printing opportunity in China. InfoTrends definition of a production printing environment is one where there is a dedicated staff that primarily prints the work of others. This includes the commercial printing market, from small quick printers to large commercial printers. It includes digital printing specialists, copy shops, quick printers, in-plant operations and specialists such as packaging, book or forms printers.

We surveyed 388 print providers in China, all of whom were decision makers as it relates to purchasing equipment and software. Surveys were conducted at the All in Print China event held in June of 2006. In addition, we conducted several in-depth interviews with industry leaders and reviewed a wide range of secondary data. Our survey with print providers is statistically valid +/- 5% at 95% probability level.

We believe the combined research provides an objective view of the market opportunity in China.

Project Objectives

This study is a continuation of our coverage of the global production printing market and our work in China. The market opportunity in China is broader than just the “digital printing” market as the industry structure and requirements of the China market require greater quantification to better understanding the market opportunities.

The study addresses the following questions:

- What is the structure of the China Printing Industry; how does it compare to that of other geographies?
- What is the current state and future potential for digital printing equipment and workflow in China?
- What services do print providers offer?
- What are the existing and future revenue sources?
- What existing equipment do they own and what are future equipment acquisition plans for digital equipment, software, and workflow, computer to plate, presses, and finishing?
- What is the appropriate value proposition for digital printing processes in China?
- What is required to accelerate the adoption of digital printing technology in China?
- What workflow infrastructure do they currently have and what are future plans?
- How much do they value labor savings improvements and the goal of attaining “super-efficiency?”
- How important are industry standards to these service providers?
- By segment, how is a typical plant equipped, and what are the primary brands they have installed?
- Who are the preferred vendors for prepress, printing, and workflow products?
- What applications do they currently produce?

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