Dear Colleagues,

this will be one of my last messages as President of Global Print. Next month, on the occasion of our meeting in London, I will have completed my tour of duty and will hand over to the next president.

In the past two years, we have continued the ongoing debate about the future of print and paper. Here in Germany, we decided to take the bull by the horns and take a more pro-active role. Under the headline “PRINT 2030” we organised a series of strategy workshops in order to develop a mission statement for the future of our global industry, in which we focused on the question which role printing and paper will play in a future world economy that many experts believe will be pre-dominantly digital.

We were able to identify quite a number of opportunities and challenges. Printed products have a bright future because they can convey so much more than just electronic media. In order to make the most of those opportunities, our industry will need to be capable of providing its customers’ print products with desirable physical properties, in some cases even functionalities. Meanwhile, users expect print to be tailored to their needs, all the while remaining very price competitive. In order to meet these requirements, we will have to be able to merge digital and physical worlds in printed products.

Our workshops have resulted in a roadmap and already we see quite a few print and paper technology companies on their way into the future. Challenges and opportunities abound!

I look forward to seeing you in London!

Sincerely yours,
Kai Büntemeyer
PRINT CHINA 2015
Started On-line Booth Application

The 3rd International Printing Technology Exhibition of China (Guangdong) - PRINT CHINA 2015 - has launched booth application. The exhibition will be held at Guangdong Modern International Exhibition Center on April 7th-12th, 2015. It's expected that the exhibition area will reach 140,000 m² and attract more than 180,000 visitor entries.

In order to guarantee the accuracy of the exhibitors' information, all the booth application should be submitted on PRINT CHINA 2015 official website. The official website has been updated and launched the on-line application system. Please visit www.printchina.org and click the Booth Application on the right side.

Under the theme of “Green, High-efficient, Digitalized and Intelligent”, Print China 2015 will strive to reflect the latest achievements and cutting-edge development trends in terms of international perspective and strategic height, and to bring about new development opportunities for both sides of supply and demand and China’s printing industry through exchanges and dialogues between colleagues from the printing industry all over the world.

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VDMA: Printing and paper technology manufacturers look ahead

- 2013 business year with declining sales and order intake
- Manufacturers start long-term strategy talks on “Print 2030”
- 3D printing will be promoted in a separate working group

The German printing and paper technology industry looks back on a weak 2013 business year. The sales volume of the total industry decreased by eight per cent compared to 2012. The order intake fell ten per cent. "Our cautiously positive expectations have not come true," said Dr. Markus Heering, Managing Director of the Printing and Paper Technology Association of VDMA, at the annual press conference of his association in Frankfurt on Tuesday.

The development in the markets of the paper technology, paper converting technology and printing technology sectors were different. Sales with machines, systems and components for papermaking rose by 14 per cent. "This is a basic effect after the considerable sales decline in 2012," Heering explained. Orders received in this sector declined by 21 per cent.

As regards printing technology, sales were ten per cent lower than the year before. The order intake also decreased by nine per cent. The development of the technologies was different: The demand for web offset printing presses dropped clearly. For sheetfed offset, the situation is stable, while the demand for flexo and gravure printing presses rose.

The 2013 sales of paper converting machines also went down 14 per cent. The order intake decreased slightly (-4%). The globalisation trend continued. While exports to EU countries declined, those to North, Central and South America as well as North Africa and the Middle East rose.

Exports to BRIC countries weaken

According to Heering, the weak business development was due to the declining demand from the BRIC countries. Exports to China fell 12.5 per cent. The decline in the most important foreign market of the German printing and paper technology manufacturers affected the manufacturers of paper technology (-17.6%) and paper converting technology (-16.6%) more strongly than the printing technology manufacturers (-8.7%). The decrease of exports to India was unexpectedly high as well. Exports of paper technology decreased by four fifth. Exports of paper converting machines were 34 per cent and of printing technology 19 per cent below the level of the previous year. India fell out of the top ten of the export markets in all sectors. Business in Brazil and Russia also largely fell short of expectations.

Consolidation and structural change continue

Due to the weak demand, utilisation of the production capacities was on average only 75 per cent in 2013. The market consolidation continues. Nearly everywhere, capacities and employment are being adjusted to the market situation. The structural change also continues in the customer industries. Smaller non-specialised printing houses shut down by the dozen. Which means for the manufacturers of printing and paper technology: There
are no potential investors in new technology any longer. Second-hand machines push into the market. At the same time, the requirement profiles of printed products change. Trends towards individualisation, personalisation and finishing require radical technical changes. The same applies to the packaging printing market whose product and process environments change massively.

**VDMA initiates comprehensive “Print 2030” strategy talks for manufacturers**

The VDMA Printing and Paper Technology Association used the last few months in order to hold intensive strategy talks within the industry. “Under the motto “Print 2030”, we organised a series of strategy workshops in order to develop a “mission statement for the future” of our industry,” Kai Büntemeyer, the Chairman of the Association, reported. They had a focus on the question which role printing and paper can play in an increasingly digital future.

“Print products become more individual, more functional; they become more sophisticated and more emotional. For printed products, it will no longer be sufficient to merely inform. They also need to offer added values – and they must remain affordable with short runs as well,” said Büntemeyer shortly describing the challenges. The strategy workshops which were attended by board members, students of Media University Stuttgart and representatives of the member companies raised the awareness of all participants for the need for technological and organisational actions. Strategic fields of action were identified and a roadmap up to 2030 was prepared.

**Analogue and digital worlds merge**

The workshops identified “convergence” as the crucial challenge. “The analogue and the digital world are merging,” Büntemeyer explained. This requires harmonised, largely automated process chains with defined interfaces. The Working Group “Process Chain”, for instance, hopes to be able to create a realtime-capable system for a process chain for all manufacturers concerned for presentation at the next drupa in 2016 already. The aim is a merger of digital and analogue printing methods which shall enable the increasingly industrialised customer industry to individualise and personalise printed products on large configurations. “If we succeed in harmonising the process chains in printing, our VDMA joint stands at international fairs and exhibitions will get a new significance,” said Büntemeyer. Then, interested parties from different regions and different industries will be able to order complete process solutions quasi from one single source. “Printing and paper technology “Made in Germany” will continue to stand out positively from its competitors,” he said with conviction.

The “Print 2030” initiative has shown that the companies will have to concentrate even more strongly on future-oriented areas like on-demand-printing of books and catalogues as well as “printed electronics”. The developments in 3D printing were a subject of discussion as well.

**The VDMA will promote 3D printing in a Working Group**

Since 3D printing is of great relevance as a cross-cutting topic for different sectors of the engineering industry, the VDMA has decided to set up a Working Group Additive Manufacturing. In future, it will bring together all parties concerned from all parts of the value chain – manufacturers of 3D printing systems as well as industrial users, material developers and representatives of research and science. They wish to join forces in order to increase the huge technological and economic potential of additive manufacturing methods in industrial applications.
3D printing: Dialogue between industrial users and technology manufacturers

- The additive manufacturing processes are gaining ground in many industries
- High potential for the mechanical engineering industry
- Great response at VDMA specialist meeting

3D printing has the potential to radically change the established industrial processes. For potential users and the mechanical engineering companies alike, the advance of the additive manufacturing processes raises questions galore which, quite often, both parties can only answer in concert.

Last year, the Printing and Paper Technology Association of VDMA, therefore, initiated an industrial platform for 3D printing in order to start a discussion among industrial users and 3D printing technology manufacturers. The first expert meeting in June 2013 was followed by the specialist meeting on "Additive manufacturing processes and aspects of the value chain" on Wednesday in Frankfurt. The focus of this event was on the direct transfer of know-how among the 3D printing technology manufacturers and users, the differentiation between the performance features of the different processes as well as research initiatives for "generative manufacturing methods". Among the approximately 100 participants were experts and representatives of a total of 50 interested companies and research institutions.

Mechanical engineering in demand as a supplier and user

"This response was a really positive surprise, as was the wide range of industries represented there," said Rainer Gebhardt, 3D printing expert of the VDMA and the organiser of the meeting. It was attended by, among others, representatives of the drive engineering and automation technology, plastics technology as well as pneumatics and electronics industry. Furthermore, manufacturers of and suppliers for additive manufacturing were represented there.

Gebhardt sees the strong interest in this specialist meeting as a signal that the German mechanical engineering industry has recognised the high potential of the additive processes for those of their own machines and technologies that are mostly manufactured in small series. Furthermore, there are clear indications that the willingness to use one’s own manufacturing know-how for the further improvement of this young technology is great.

Innovators certainly have not missed the boat

Dr. Eric Klemp, Managing Director of the Direct Manufacturing Research Center in Paderborn, makes it clear that innovators certainly have not missed the boat: “Additive manufacturing still has to cope with many challenges in order to become an established series production process.” For its successful application, many framework conditions need to be observed.

Rainer Gebhardt's résumé of the specialist meeting is fully positive: “The dialogue between users and technology manufacturers has been opened. Now, these talks need to be continued and efforts must be taken to improve the quality and maturity of the manifold additive processes." For all parties concerned, the VDMA offers the possibility to enter into the debate about future regulations and standards, quality expectations, reproducibility or tolerances. “Considering the potential of this technology for the value chain in the mechanical engineering industry, we should seize the opportunity offered by the close cooperation of users, component developers and 3D technology manufacturers at our highly developed industrial location," adds Gebhardt.
INDIA
News from IPAMA

The Indian Printing Packaging & Allied Machinery Manufacturers’ Association (IPAMA) is one of the premier organizations in the country engaged in promoting Indian printing, packaging and graphic art industry, through various means, such as participation in international exhibitions, conferences, buyer-seller meets etc. It also organizes an exhibition ‘PRINTPACK INDIA’ of international standards, wherein participants from different parts of the globe display their latest machinery and allied products. Today IPAMA is also in the centre-stage and playing an important role in policy making on ‘exports and imports’ in collaboration with various Government agencies, CII, FICCI, ASSOCHAM and FIEO. IPAMA represents 80 per cent of the Indian graphic arts industry. As on date, more than 250 direct members are on its roll. The Association has also been duly recognized by the Ministry of Commerce and Industry, Government of India.

PRINT PACK ARABIA (APRIL 7-10, 2014):

IPAMA is co-organising Print Pack Arabia 2014 exhibition at Expo Centre, Sharjah from April 7 – 10, 2014. The Expo Centre, Sharjah, the main organizer of this event, is the Exhibition Wing of Sharjah Chamber of Commerce & Industry. More than 35 Indian companies/participants have already confirmed their space bookings and remitted the space rentals. The exhibition will provide a unique platform to expose the Indian products into the Middle East & African countries.

As far as the exhibitor profile is concerned, it includes digital printing, inks, coatings and varnishes, offset printing, packaging machinery, packaging materials, paper manufacturers & suppliers, packaging services, plates and plate making equipment, Press Room handling equipment, print finishing/binding equipment, printing equipment, printing machinery, printing materials (paper board, foils films etc.) screen printing and screen printing equipments.

The printing and publishing industry in UAE region is expected to cross the figure of US$ 7 billion by 2015. It is interesting to note that UAE’s 80% printing & packing industry is based in Sharjah & Ajman and is also emerging as the centre of paper and printing industry in the Arab World. Apart from these advantages which will be available to the Indian exhibitors, the region’s strategic location and emergence as a major transportation hub will further help the producers to enjoy huge competitive advantage over others.

The Print Pack Arabia 2014, which has been planned with the joint efforts of Sharjah Chamber of Commerce & Industry, is expected to attract serious business visitors from the whole of Middle East, CIS regions and African Countries like Ethiopia, Egypt, Libya, Sudan, Somalia, Kenya, Tanzania, Chad, Nigeria, Angola, South Africa and many more.
IPAMA is the chief organizer of prestigious international exhibition PRINTPACK INDIA. The next exhibition, in the series, will be held at Expo Centre, Greater Noida, India from February 11-15, 2015.

The Print Pack India 2013, which was organized at Expo Centre, Greater Noida, India from February 23-28, 2013 gave excellent business results. Record number of visitors, both domestic and foreign, witnessed the Show. The exhibition was organized in an area of more than 30,000 square meters. There were 345 exhibitors from India and abroad, overseas visitors were from USA, UK, China, CIS countries, Sri Lanka, Bangla Desh, Nepal, African continent; Indonesia etc. The Printpack India 2013 had generated business worth over US$ 230 million. The serious business enquiries received during the currency of the exhibition had crossed the figure of US$ 400 million.

The Expo Centre, Greater Noida, where the Print Pack India 2015 will be held, is well connected by Road, Rail and Air from Indira Gandhi International Airport, New Delhi. All modern facilities for holding international exhibitions and conferences are available at the Expo Centre, Greater Noida, NCR, India.

This is to put on record that the Indian printing and packaging market is expected to cross the figure of US$ 30 billion by 2015. The Print Pack India 2015 will provide a unique platform to domestic and international exhibitors to showcase their latest technology and equipment.

MISCELLANEOUS ACTIVITIES:
IPAMA publishes its quarterly bulletin named ‘IPAMA BULLETIN’ in which information on printing, packaging and graphic art industry, is incorporated for the benefit of its members and general public. Various workshops, business conferences etc. are also organized, from time to time, for the benefit of the Indian industry. The IPAMA office bearers are also going abroad, as part of the Government of India sponsored business delegations or delegations sponsored or supported by FICCI, FIEO and CII etc.
Exports support the growth of the Italian graphic and paper machinery industry. Acimga’s market survey for the IV quarter 2013-I quarter 2014 reveals optimism from market players but also emphasizes the stagnation of the domestic market. Exports at risk for the growing euro-dollar exchange rate and for International increasingly aggressive competition.

It’s too early to talk about recovery. However, in a scenario where the domestic market is stagnant and international competition is increasingly aggressive, the predominant outlook for the graphic and paper machinery industry – one of the leading segments in Italy’s instrumental mechanics industry – is optimistic.

Exports and export-generated revenues are growing, thus offsetting the protracted difficulties in the domestic market and keeping employment levels stable. In addition, expectations for the first quarter of this year are positive. This in sum is what emerged from the market survey performed by the research department of Acimga – the Italian manufacturers association of machinery for the graphic, converting and paper industry – with regard to market performance in the IV quarter 2013 and forecasts for the first quarter 2014.

Acimga represents a sector producing over € 2 billion in revenues, 83% of which are generated by exports and employs 7,000 people.

The qualitative market survey, conducted on a representative sample generating 82% of total revenues, clearly shows that exports as companies’ main strength: 48% of companies report an increase in exports in the fourth quarter of 2013, 40% report stability and only 12% report a drop. These results are expected to replicate in the first three months of 2014, with substantial stability (48%) and a greater number of companies expecting growth (32%) compared to those expecting a decrease (20%). This data is supported by order performance on foreign markets, which shows an upward trend at the end of 2013 and is expected to remain stable (48%) in the I quarter of 2014 with a clear predominance of positive forecasts (44% compared to 8%) from market operators. The international scenario, traditionally very receptive to Italian products, looks interesting for the coming months especially in Far East markets, in Middle-East countries like Iran and in the recovering U.S. market. Conversely, it is less promising in Latin American countries compared to the past.

Export performance offsets a critical domestic market, curbed by the liquidity crisis which causes even those companies interested in investing to be extremely cautious. The domestic market was substantially stagnant in the last portion of the year (46% of companies report stability, the remaining sample is equally divided between increase and drop) with optimists having a slight margin in the forecasts for the I quarter 2014. The same holds true for domestic orders, again with a predominant positive outlook for the beginning of 2014. Nearly 80% of sample companies report stable employment levels.

“Our companies represent an industry segment capable of reacting to difficulties and having with a strong presence on global markets – says Acimga president Marco Calcagni – as clearly evidenced by the results of the market survey. However, we cannot overlook important signs like the stagnation of the domestic market, slowed down by a liquidity crisis banks do little to mitigate. Also, we need to pay close attention to the international market, where competition is increasingly fierce. This – says Mr Calcagni – coupled with the overvaluation of the Euro vs. U.S. Dollar signals the need for greater, more effective support to the ‘Italian systems’ on international markets”.
EXPECTED TREND ON FOREIGN MARKETS

Exports: Expectations for the first half of 2014

- 20% decrease
- 48% stability
- 32% increase

Source: ACOMECA Economic Dept.
1st quarter 2014

Foreign Orders: Expectations for the first half of 2014

- 8% decrease
- 48% stability
- 44% increase

Source: ACOMECA Economic Dept.
1st quarter 2014
EXPECTED TREND ON DOMESTIC MARKET

**Domestic Turnover: Expectations for the first half of 2014**

- **Decrease**: 15%
- **Stability**: 54%
- **Increase**: 31%

Source: ACIMGA Economic Dept.

**Domestic Orders: Expectations for the first half of 2014**

- **Decrease**: 19%
- **Stability**: 46%
- **Increase**: 35%

Source: ACIMGA Economic Dept.
The Printing Market in Japan

- The Japanese economy is getting on the growth track with the recovery of export industry backed by the correction of the Yen appreciation in the foreign exchange market and with steady public investment and consumer spending.
- The printing industry is also showing signs of recovery, although still mild. However, it is expected that the market will continue to face severe management environments as the industry faces various issues such as emersion and spread of diversified information media and shrinking of the market caused by decreasing birthrate and aging population.
- According to the Government’s Industrial Statistics, the total market size of the printing industry for companies with 4 or more workers was JPY5500 billion in 2012, decreasing by 1.4 points from the previous year.
- To give you some more details, the production amount by printing sectors is as follows: These figures are from the Government’s Indices of All Industry Activities and are for companies with 100 or more employees.
- Publication printing was JPY95.9 billion, which is a decrease of 7.1 points from the previous year.
- Commercial printing was JPY130.5 billion, increasing by 6.1 points from the previous year. However, this is a decrease of 12.3 points compared to 5 years ago.
- Concerning other printing sectors, security printing was JPY5.4 billion, decreasing by 3.1 points compared to the previous year, business printing was JPY51.3 billion, increasing by 2.6 points from the previous year.
- Package printing was JPY79 billion, increasing by 8.3 points from the previous year and this market remains relatively stable.
- The market other than that of package printing continues to shrink every year.

The Printing Machinery Market in Japan

- Total production of Printing Machineries in 2012 was JPY157.3 billion, which is a decrease of 2.1 points from the previous year.
- Looking at the total production by types of machineries, printing machineries decreased by 2.7 points from the previous year. Pre-press machineries decreased by 3.3 points, bookbinding machineries increased by 2.2 points, paper converting machineries increased by 0.8 points compared to the previous year.
- The total exported amount of printing machineries was JPY133.3 billion, decreasing by 11.9 points compared to the previous year.
- In the domestic market, with the continuing sluggish economy and diversification of print media, continued dull tone in the demand for printing is unavoidable. However, with the government’s enforcement of the new taxation system to promote capital investment and with the introduction of cutting-edge technology such as digital printing, the vitalization of market can be expected.
- The overseas market is showing good signs with improvement in the environment for export backed by the correction of the strong Japanese yen in the foreign exchange market. This centers in exports to Chinese and Southeast Asian markets.
The Japanese Printing Machinery Market

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IGAS 2015

Let us take this opportunity to give you the details of the International Graphic Arts Show 2015 which will take place next year from September 11th to 16th, 2015.

The main theme will be "Print +innovation, further challenge to the print technology". Under this main theme, IGAS 2015 will propose creation of new businesses through innovation of printing technology, services, and solutions and will also be providing an opportunity for active business interchanges.

A number of innovative activities and events are being planned, including "+SESSION", where various lectures and panel discussions will be held under the various themes, "+TOUR", where guided tours visiting the highlight areas of the show will be conducted, and "+LIVE STUDIO", where multiple live events inviting various special guests will be held.

We look forward to your active participation.
GRAPHISPAG 2015
A new graphic industry that prints all

Trends, printing technologies, design, supports and innovative materials, customization, graphic products and services with high added value, shocking finishes and growth opportunities for the sector. This is Graphispag, the largest exhibition of graphic communication industry in Spain and Portugal, organized by Fira de Barcelona in collaboration with Asociación Graphispack, which will take place from 3rd to 6th February 2015 on the Gran Vía premises of Fira de Barcelona.

The exhibition will be organized in graphic applications so that visitors will find suppliers of technology, materials, services and finishes according to the product to print. This way, we will see the possibilities of printing packaging and labels in different systems, commercial, publishing and advertising printing, printing industries, large format printing, textile printing and pottery, promotional gift, photo products, etc.

In this edition, the fair will also impact on the line began in Graphispag.digital 2013 in order to show new areas where printing has greater growth potential, thanks to the launch of customization, digital graphic technology and expansion and improving of the range of supports that make it possible to print just about anything.

In addition, Graphispag will highlight the weight still have conventional printing methods in the graphic industry, also presenting opportunities and profitability of hybrid printing (offset and digital) for specific jobs: developments in flexography or gravure focused mainly to the world of packaging and packing or screen printing finishes.

At the same time, Graphispag will seek the incorporation of new actors in the field of functional and 3D printing to expand the graphic business vision to the 30,000 expected visitors.
Business Conditions of the Swiss Graphic Machinery Industry Year 2013
On course for recovery, but with obstacles ahead

The recovery of the Swiss electrical and mechanical engineering industries and associated technology-oriented sectors was helped by the improvement of the global economy. According to the quarterly survey of Swissmem reporting companies, there is a strong likelihood of this gratifying trend continuing. 54.1% of companies surveyed currently anticipate for 2014 a rise in new orders from abroad over the next 12 months. Only 11.5% fear deterioration for 2014 in the orders situation.

The graphic machinery export figures also indicate some recovery from the unbroken downward trend of the last 10 years. This careful statement is underlined with this year’s result counting CHF 1.185B of exported goods to over 100 countries worldwide. The result is slightly lower than last year’s performance of CHF 1.2B, but fortunately there was no major setback. If Swiss firms are able to adapt their product development and keep their production flexible in order to respond to changing market demands then, the sector’s negative export trend might bottom out. As a prerequisite, companies’ innovation processes need to be continually optimised, successfully implemented and monitored.

However, obstacles may arise during the coming months and years, which will reveal the extent to which the yes-vote in the referendum on mass immigration will have a negative impact on expectations and possibly also business in the graphic machinery industry and the MEM (metal, electrical and machinery industries) industry as a whole. In view of the resulting uncertainty about Switzerland's future relationship with the EU, there is likely to be a worsening of the investment climate.

Exports to the EU, which is still the most important market for the graphic industry with 56% of export sales, posted an approximate 6% increase.

In 2013, Switzerland’s most important export channels were Germany, USA, France, Italy and UK followed by China and Poland. Germany has received 15% more goods (value) than last year. This helped to cover the decline of US demand in 2013.

UK and France also fell back compared to last year. On the other hand China, Poland and surprisingly Indonesia were progressing very well. Indonesia roared with a 244% growth on a low, but promising level. Indonesia might overtake Poland in terms of absolute export value in the coming years.

Besides Germany, other growth champions were The Netherlands, Poland, Mexico and Belgium.

According to the statistics, exports to the attractive Indian market disappointed the most. Merely half of the 2012 export value were realised in 2013.

Swissmem unites the Swiss electrical and mechanical engineering industries and associated technology-oriented sectors.

Raoul Keller, Secretary General, Graphic Machinery Group, Swissmem, r.keller@swissmem.ch
Now more than ever it is essential for all graphic communications leaders to become informed about new industry trends and to understand the impact these trends will or could have on their business. Some trends point to opportunity, while others may foretell threats that must be addressed in order for a company to maintain viability and profitability. The newly updated landmark NPES study, “The World-wide Market for Print: Identifying Global Opportunities for the Print Industry,” provides valuable insights into potential profit opportunities for progressive companies in a position to seize and capitalize on them.

The Big Picture
Total world print revenue is projected to grow 8%, up from $578 in 2012 to $667 (U.S. $billion) in 2017, with global economic recovery fuelling consumption, to varying degrees, across all print categories. Shares of the 2017 pie are: Asia Pacific (41%), Western Europe (27%), North America (25%), Latin America (4%), Central & Eastern Europe (3%), and MEA (1%). The study forecasts that by 2016 China will overtake the United States as the largest print market in the world. More specifically, by 2017 at $154 billion, China is projected to be the largest print market, compared to the U.S. at $141.8 billion.
And it won’t surprise many that package printing dominates much of the global print revenue growth. However, it should be noted that in emerging country markets (including, among others Indonesia, Philippines, Turkey and Singapore, in addition to the BRIC countries) as incomes, literacy and consumption rise, along with packaging, many will experience growth in publishing—magazines, newspapers and books.

The U.S. Market
Print will continue to be challenged in the U.S. market, except for packaging where revenues are holding strong. Although emerging markets will record the highest growth rates (some are from a very small base), mature markets will continue to experience an increase, especially as new technologies such as QR codes and printed electronics come into the mix.
According to the study, publishing, advertising and transactional printing will continue to suffer declines in varying degrees. Publishing is transforming into a smaller niche industry, as mass market books, newspapers and some magazines migrate toward a digital platform.
While digital continues to make inroads in advertising, print is still an integral part of the marketing communications mix. Business and transactional print continues to lose share to online presentment, driven by consumers’ environmental concerns and brand owners' quest to reduce costs.

**Recommendations for the Future**

The research conducted for NPES by the Economist Intelligence Unit, the business information arm of The Economist Group, reaffirmed many of the strategies that industry pundits have stressed for some time now and focused on these key recommendations for industry leaders seeking to grow and advance their company's competitive advantage in 2014 and beyond:

- Determine which fast growth markets to play in, where to grow organically vs. in organically, and what to emphasize for 2014 vs. later years.
- Capture growth in packaging while maintaining performance in other sub-segments as they recover from the lasting effects of the Great Recession of 2007-2009.
- Engage in green printing and eco-friendliness initiatives to meet market and regulatory demands, and enhance your corporate and industry image.
- Shift beyond a “print only” business model and organization with solutions based offerings to compete in service-driven markets, and attract high margin business; build capabilities in consumer insights, IT and marketing. And most important: develop new pricing and engagement approaches to replace traditional transactional selling approach.
- Prepare for disruptive innovation across markets; where possible, be the disruptive innovator, not the disrupted.

These may sound like lofty recommendations, but firms that think outside of the box historically are those that have remained profitable, even during the recession. The Internet along with improved transportation options eliminate many geographic barriers. Should you investigate getting into packaging? Might you capitalize on opportunities in the growing publishing market in emerging countries? Do you already have expertise in magazine or book printing? Might your current customers consider having you print another country’s version as well? Can you partner with another in-country printer who needs the additional capacity or maybe your newer technologies such as UV or EB curing?

Engage 2014 as a learning year. Examine your strengths and capabilities and determine what avenues of opportunity are available to you. Is it pursuing a different market focus in your own back yard . . . or exploring the many opportunities in today's global market by determining how and where your capabilities are a fit, or what you need to do to make it a fit. There are still many opportunities out there for manufacturers and printers who are willing to do the research and increase their knowledge and skills.

The new “World-wide Market for Print” study is now available for purchase:

- Full Study: $7,500 (includes Full Study, Synopsis, and 51 Individual Country Profiles) (Complimentary to NPES and PRIMIR Members)
- Executive Summary: $1,500 (includes Executive Summary and Synopsis) (Complimentary to NPES and PRIMIR Members)
- Country Profiles: $150 each; 10 or greater: $100 each; all 51 Country Profiles: $3,900. (Complimentary to NPES and PRIMIR Members)

For more information about the “World-wide Market for Print” study contact Greg Safko, NPES Vice President of Market Data and Research at: gsafko@npes.org. To order the study, contact Rekha Ratnam, Assistant Director of Market Data/Research at: rratnam@npes.org, phone NPES at 1-703-264-7200, or visit www.npes.org.