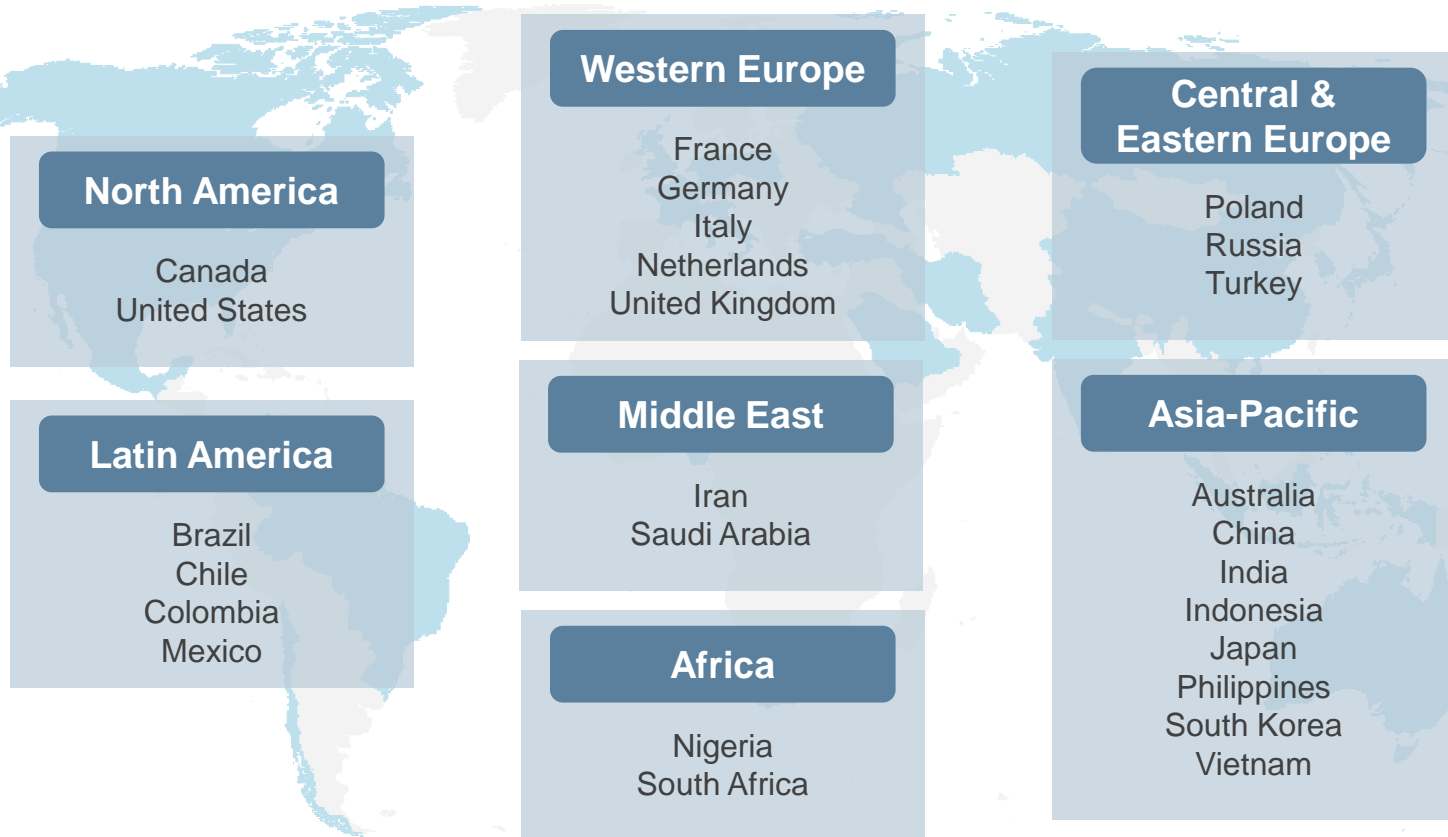


Trends and Opportunities in the Global Printing Market

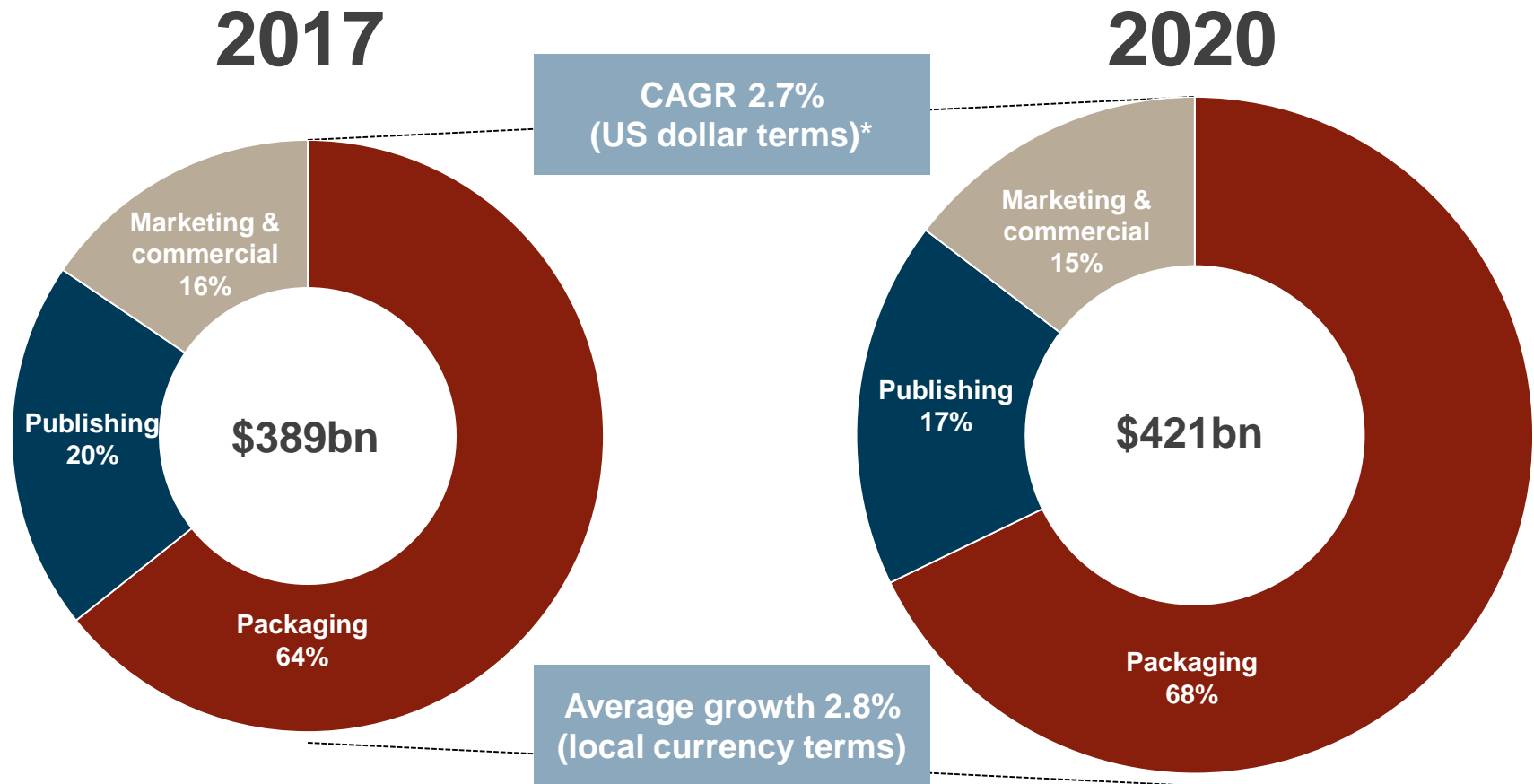
Thayer Long
President
Association for Print Technologies
May 2018

Geographic scope

The 26 countries selected and analyzed span across all global regions, representing 80% of global GDP and 70% of the world's population.



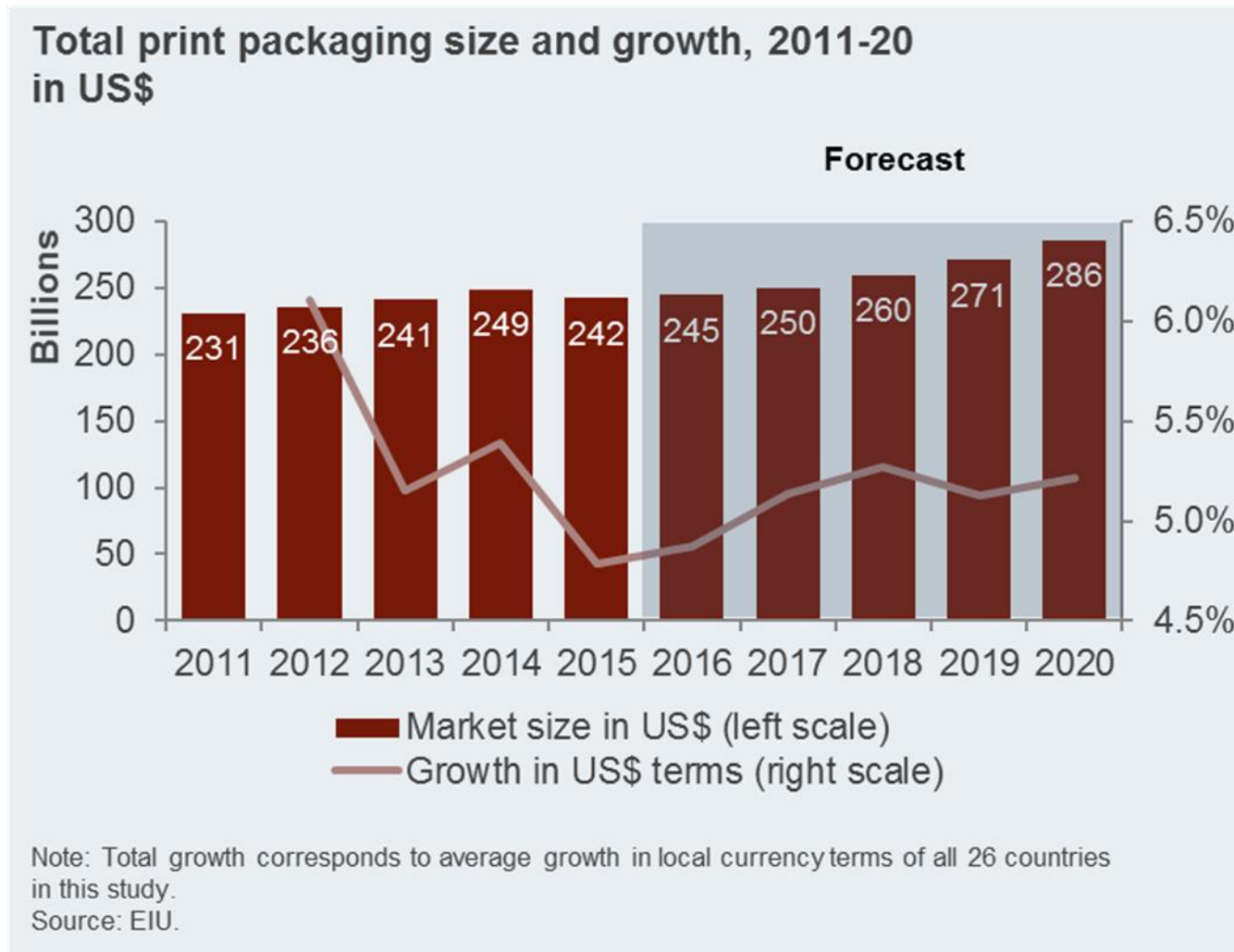
The BIG picture: Size of Publishing, Commercial, and Packaging Printing Market in Top 26 Markets



Note: The three printing segments we cover in WWMP 2.0 do not represent the entire printing market.

* Calculation based on EIU forecasts for average yearly exchange rates.

Print Packaging Market – A Bright Spot



What is driving the Packaging Industry?

Emerging Markets

Retailer Impacts

Design Thinking

Sustainability

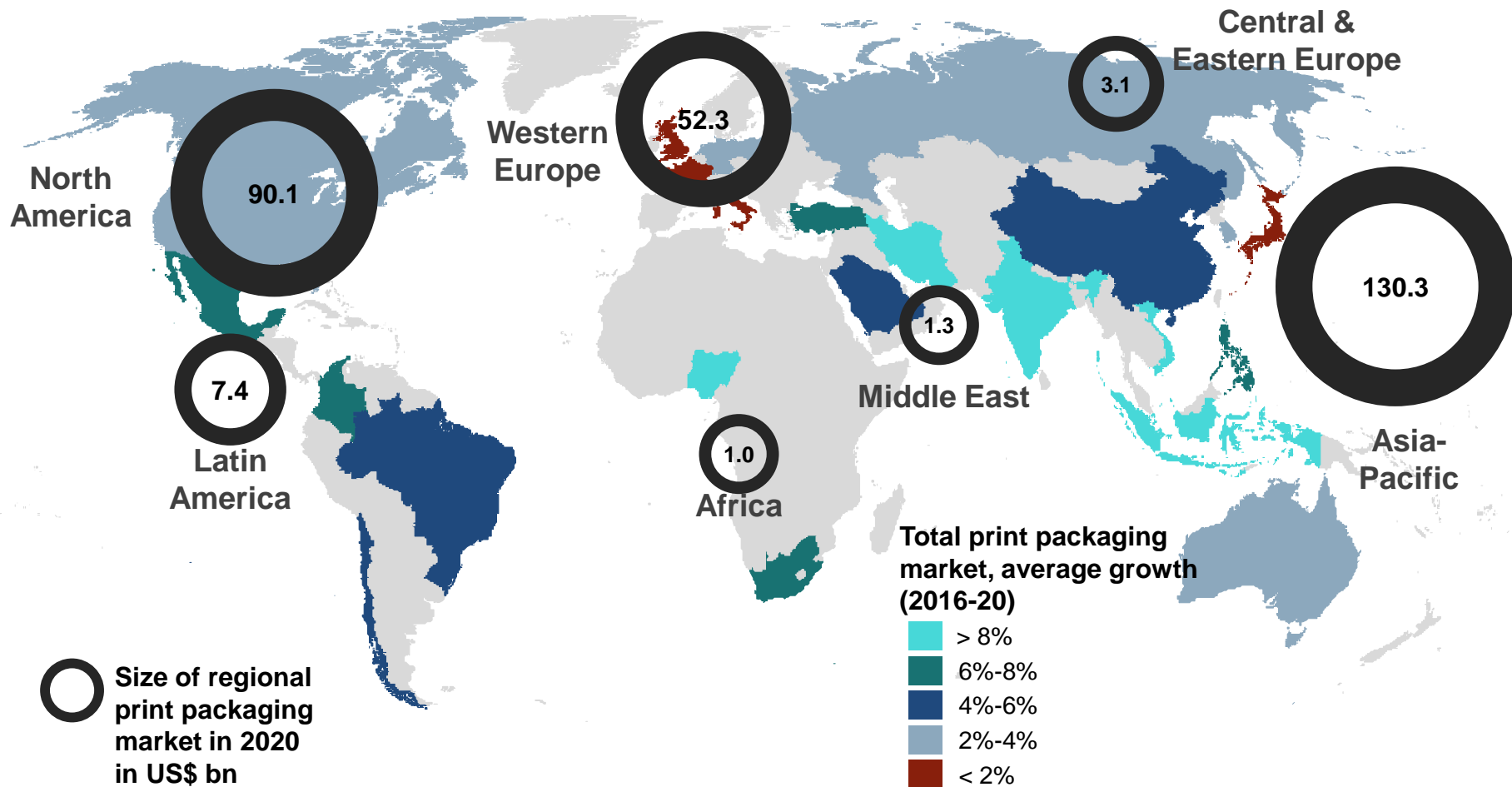
Science &
Technology

Consumers/Social
Media

Laws &
Regulations

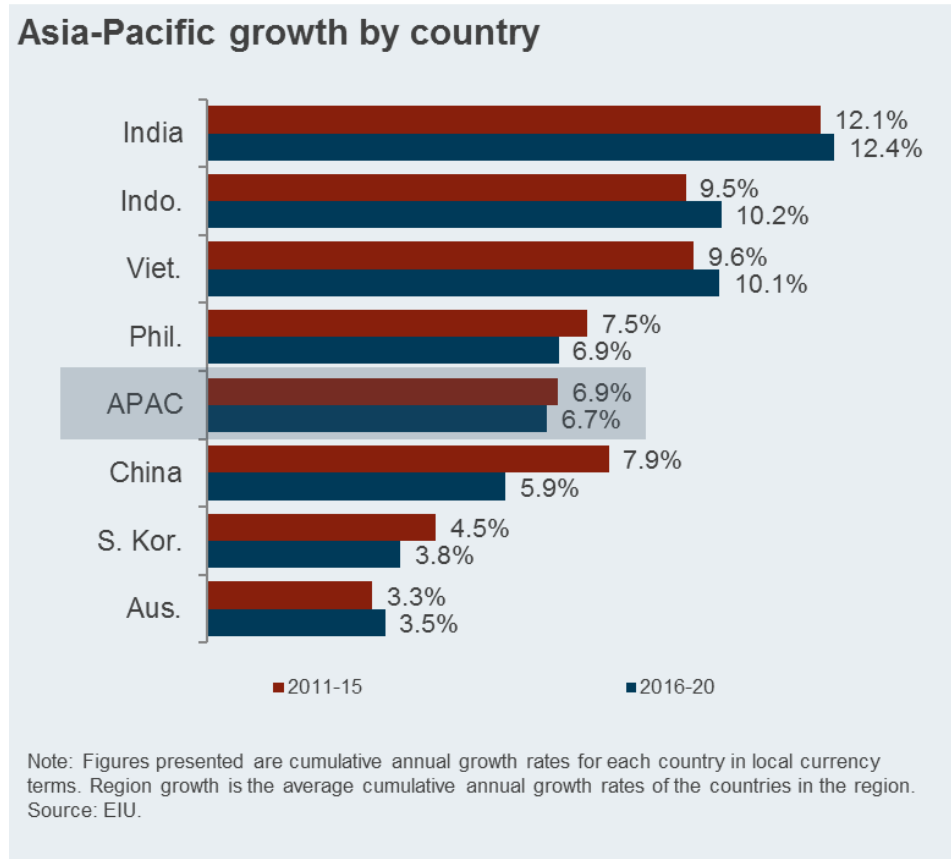
Print packaging market size and growth

Emerging regions generally have high growth but smaller print packaging markets. Asia-Pacific is the exception, having the happy confluence of both large and fast-growing markets.



Asia-Pacific

Asia-Pacific is the largest regional market for print packaging, accounting for over 42% of revenues in this study, and will be the second fastest-growing region, expanding 6.7% in 2016-20



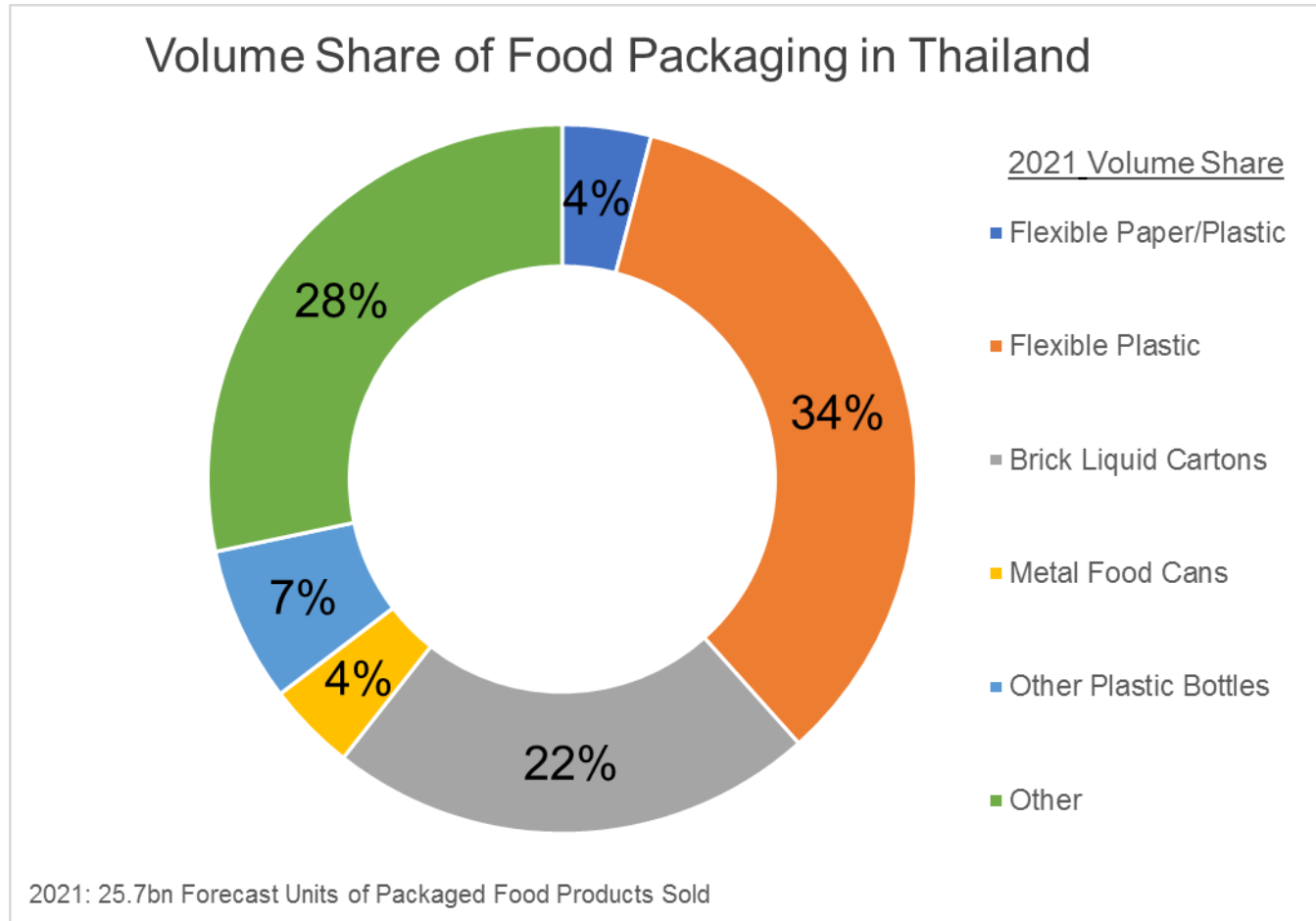
Snapshot:

Food Packaging Trends in Asia Pacific

- **Dairy Products** on China will lead the growth in **Brick Liquid Cartons**, with slim 250ml cartons gaining popularity
- **Savory Snacks** and **Confectionary** drive growth in **flexible plastic** with **small, affordable pack sizes** being popular with low-income consumers
- **Shaped Liquid Cartons** to see highest CAGR, driven by growth in plain yoghurts



THAILAND: Volume Share of Food Packaging

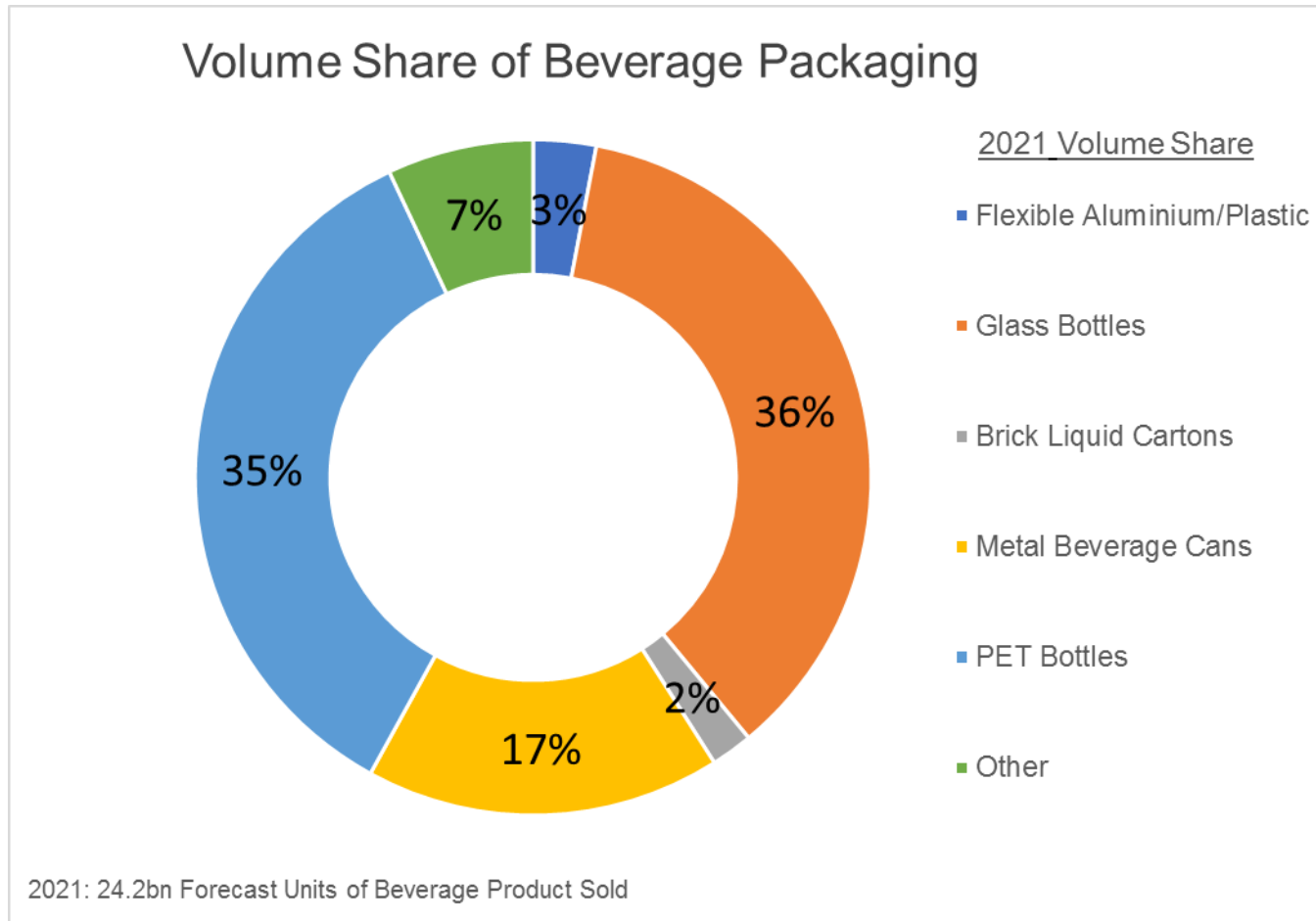


Snapshot: Beverage Packaging Trends in Asia Pacific

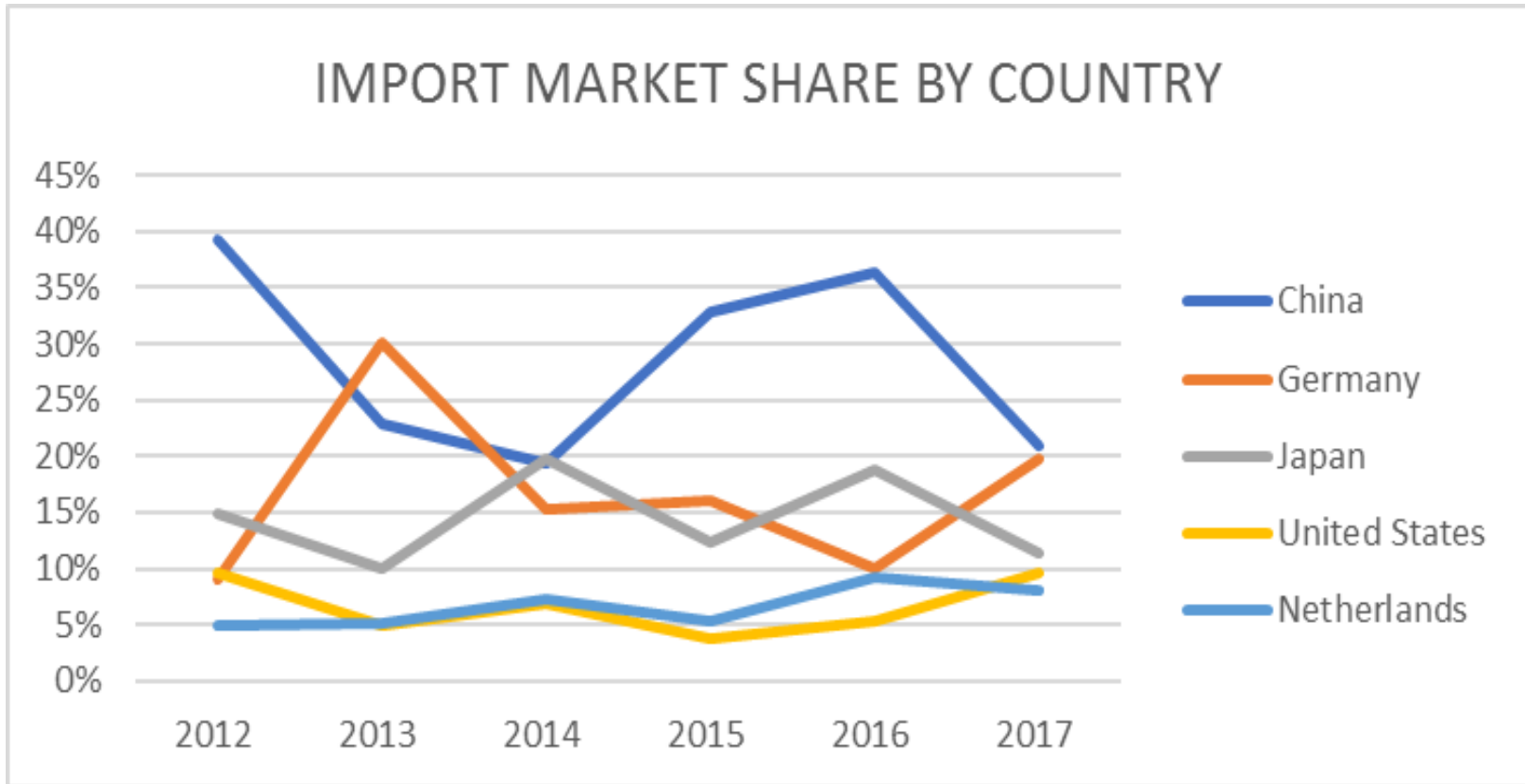
- **Increased Disposable Income** create growth in bottled water, energy drinks, and carbonates, supporting **PET bottles**
- Growing coffee consumption to drive flexible **aluminum/plastic packaging**
- **Metal Bottles** to grow steadily in beer markets. China will see a growth due to premium brands promoting limited edition bottles



THAILAND: Volume Share of Beverage Packaging



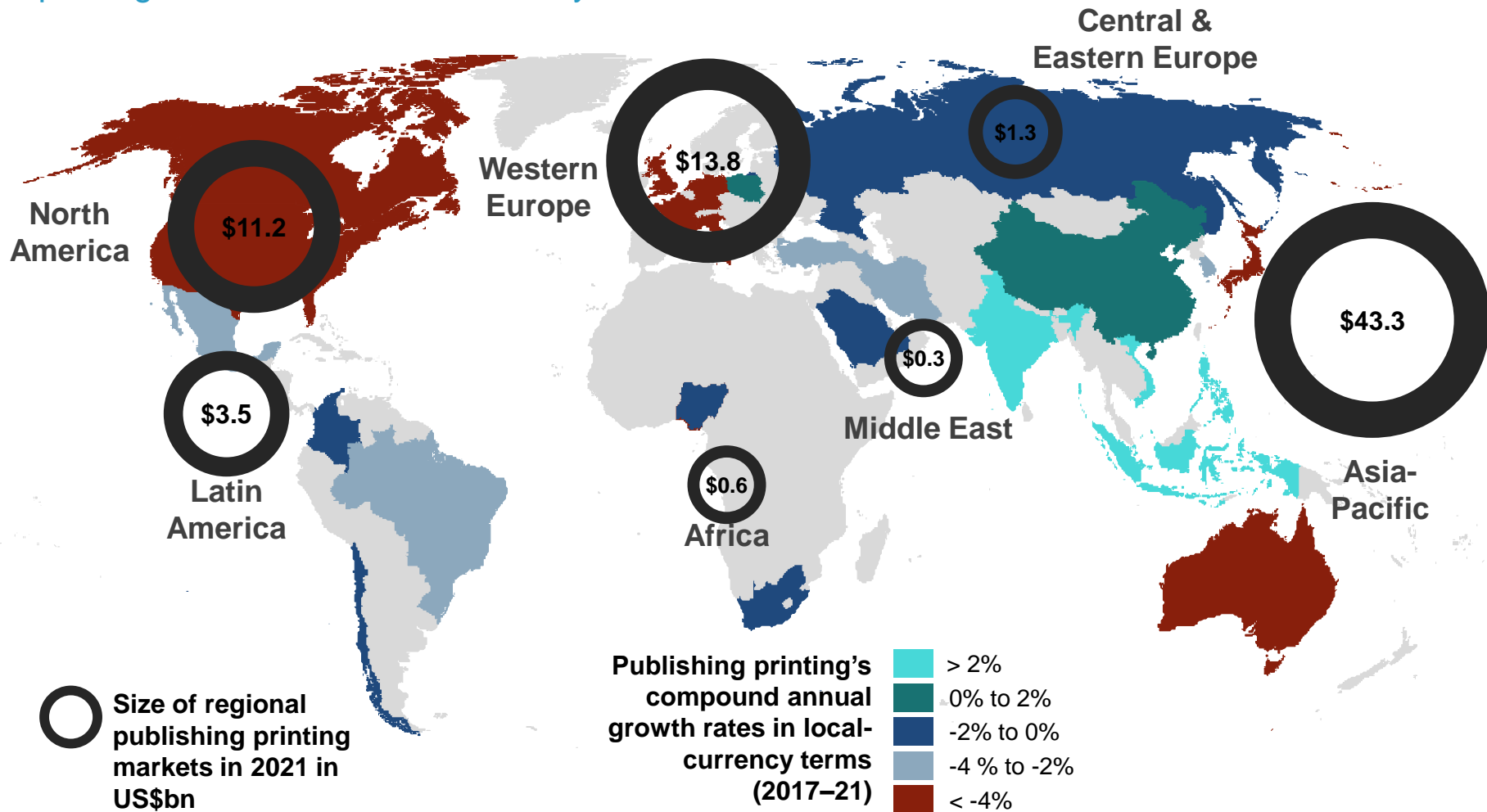
THAILAND: Food/Beverage Packaging Equipment Import



Publishing printing and marketing & commercial printing markets

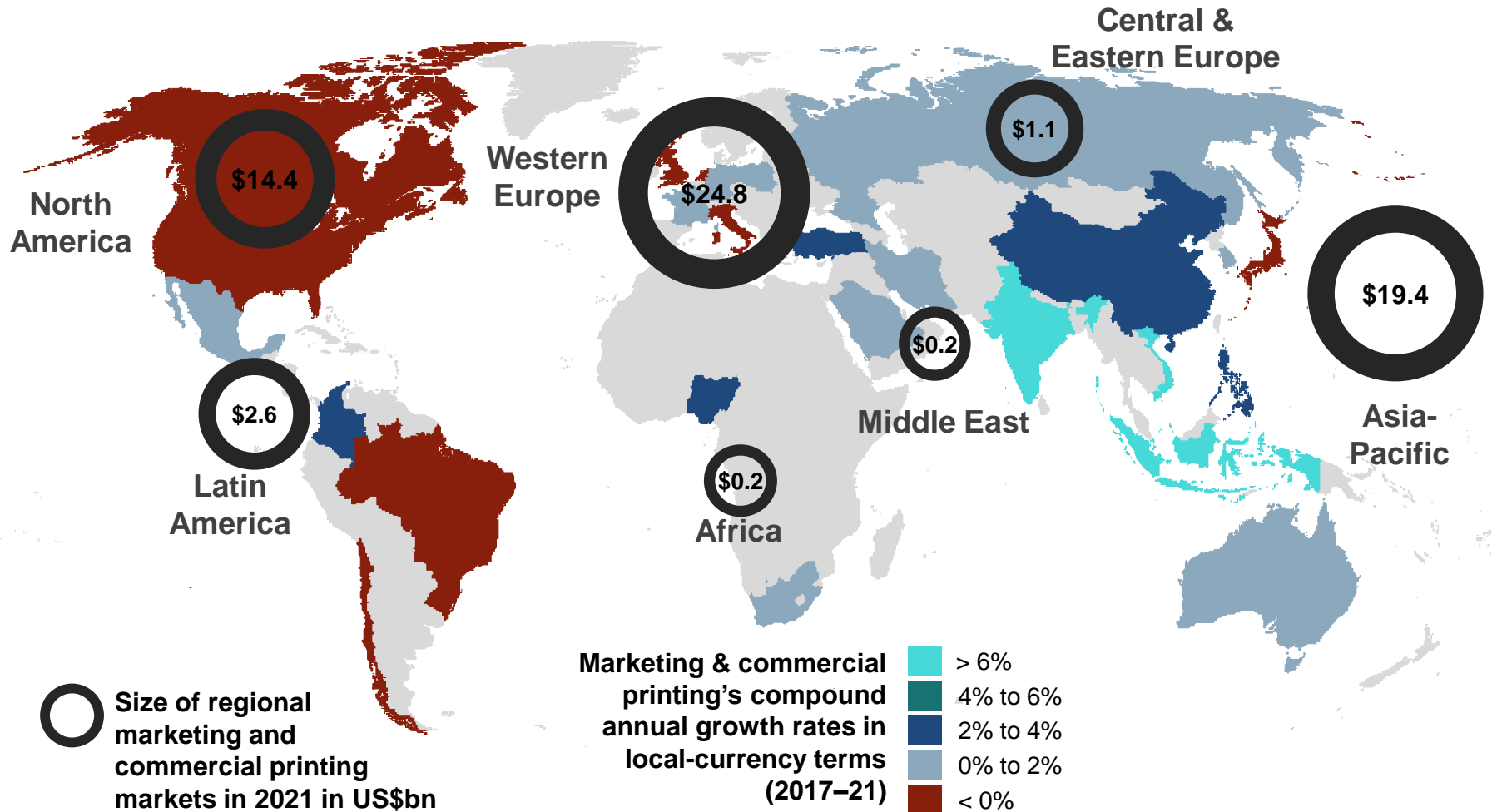
Publishing printing: market size and growth

Only some countries in Asia-Pacific will experience solid, positive growth in publishing printing. Most countries in our study will contract.



Marketing & commercial printing: market size and growth

North American and Western European markets are declining, but Asia-Pacific is growing at a healthy pace.



What is Driving the Commercial and Publishing Markets

Macroeconomic and demographic trends underpin the outlook for publishing printing markets and marketing & commercial printing markets in all countries.

Access to telecommunication technology

Access to the internet continues to increase rapidly in emerging markets. The next step is get people connected to high-speed mobile internet.

Rising education levels and literacy rates

All readers are potential print consumers. As the number of readers increases thanks to improved education levels and literacy rates, consumption of the printed word will grow.

Higher incomes

The rise of middle-income consumers in emerging markets will boost printing revenues. Consumer expenditures will increase overall, especially in education and leisure, which supports publishing printing.

Urbanization

Urbanization translates to higher concentrations of people, which makes marketing efforts more efficient.

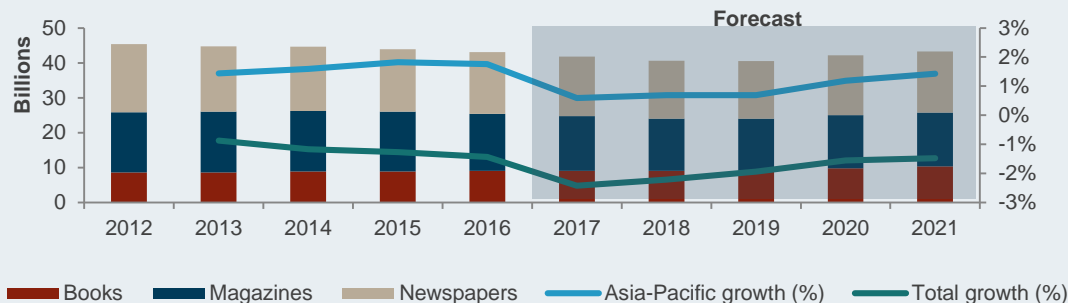
Generational gap

Younger generations tend to consume more books and magazines, while older generations consume more newspapers. But this is changing.

Asia-Pacific

Asia-Pacific is expected to outperform all other regions in terms of both the publishing printing industry and the marketing & commercial printing industry.

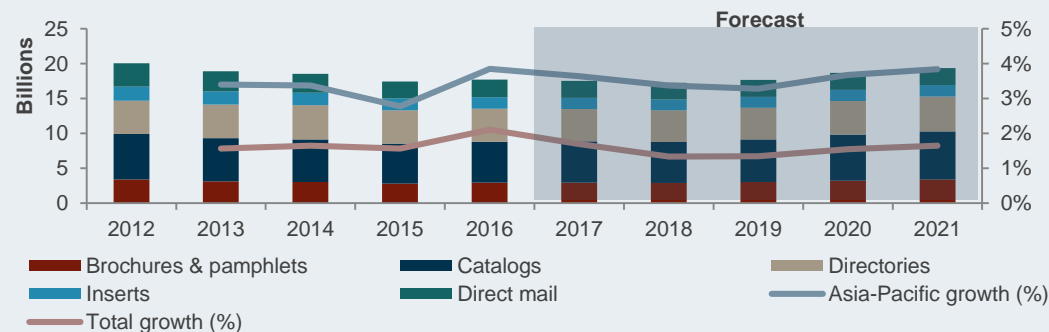
Asia-Pacific's publishing printing market by segment in 2012-21 (US\$)



Note: Asia-Pacific includes Australia, China, India, Indonesia, Japan, Philippines, South Korea, and Vietnam; Regional growth is the average LCU growth rate of all countries in the region; Total growth is the average LCU growth rate of all 26 countries in this study.

Source: The Economist Intelligence Unit.

Asia-Pacific's marketing & commercial printing market by segment in 2012-21 (US\$)



Note: Asia-Pacific includes Australia, China, India, Indonesia, Japan, Philippines, South Korea, and Vietnam; Regional growth is the average LCU growth rate of all countries in the region; Total growth is the average LCU growth rate of all 26 countries in this study.

Source: The Economist Intelligence Unit.



Thank You and Let's Go!

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